



BUSINESS PLAN

FY2020 – FY2024

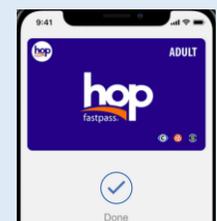
FINAL

April 2019

TriMet: A History of Innovation and Service

From our beginning, TriMet has served as a leader and innovator in public transit. We have delivered many “firsts” in our 50-year drive to strengthen the communities and the metropolitan region we serve.

- 1969** Private transit service in the Portland area faced flagging ridership and losses—threatening cuts in service. Civic and business leaders came together to find a solution and by the end of the year, **TriMet was born**. The first TriMet buses began service on December 1.
- 1973** TriMet identifies strategies to increase bus ridership by simplifying and concentrating downtown service on the **5th and 6th Avenue Transit Mall** and expanding its bus fleet.
- 1975** TriMet begins service that eventually becomes **TriMet LIFT**, well in advance of requirements by the Americans with Disabilities Act of 1990.
- 1982** **A grid of bus lines** with some running every 15-minutes or less all day is introduced to Portland’s eastside. This provided for better cross-town direct trips without having to transfer through downtown. It set the stage for future Frequent Service and transit network improvements.
- 1986** The eastside **Banfield Light Rail Project** begins service as **MAX**.
- 1998** **Westside MAX Blue Line** introduces **low-floor, easy-entry light rail cars** to North America.
- 2001** **Airport MAX Red Line** (the West Coast’s first train to plane) and the modern **Portland Streetcar** opens.
- 2004** **Interstate MAX Yellow Line** opens ahead of schedule with improvements to connecting bus service.
TransitTracker™ - one of the first real-time arrival information systems in the nation - starts.
- 2005** TriMet and Google develop the **GTFS (General Transit Feed Specification)**, which is now a worldwide standard for transit apps. TriMet becomes the first transit system on Google Transit.
- 2009** **I-205/Portland Mall MAX Green Line** to Clackamas Town Center and PSU opens on time, upgrading the Portland Mall and adding light rail service north-south in downtown Portland.
TriMet opens **WES (Westside Express Service) Commuter Rail**, a 14.7 mile, suburb-to-suburb commuter rail line with service between Beaverton and Wilsonville.
TriMet introduces **Open Trip Planner**, an online trip planner that includes transit, biking, and walking options. This open-source trip planner is now used at many systems around the world.
- 2013** TriMet introduces its **Mobile Ticketing App**. Use of this app overtakes cash payments on buses by 2017.
- 2015** TriMet opens the **Portland-Milwaukie MAX Orange Line**, which includes **Tilikum Crossing, Bridge of the People**, the first multi-modal bridge of its kind in the U.S. It carries MAX, streetcar trains, buses, bicyclists, and pedestrians only.
- 2017** TriMet introduces **Hop Fastpass®**, the next generation of electronic fare systems.
- 2018** TriMet pioneers virtual card (on mobile devices) for **Hop Fastpass®**
- 2019** TriMet releases beta version **multi-modal trip planner** with transit, walking, biking, ridesharing, and bikesharing all in one planning step for customers



Letter from the General Manager



This is the third Business Plan we've published. Updated annually, the strategic Business Plan for FY2020 through FY2024 presents our goals and objectives and how to achieve them by being strategic, maintaining what we have, and staying smart about how we grow. Achieving the Goals and Objectives and completing the Key Strategic Actions in this Plan will help us address the needs of our customers and community.

With each year, we learn more and pursue a better experience for our customers. I am very proud of our team of operators, mechanics, supervisors, trainers, and managers who have worked together to make our service more reliable. We have continued to improve on-time performance so that you can have more confidence in when your train or bus will arrive and how long it will take to get where you're going. This is not easy, as anyone who has driven many miles on congested streets during rush hour can tell you and TriMet operators have to do it every day. So, we're also working with cities and counties to get improvements at intersections, smarter traffic signals, and other ways to make buses more reliable and faster.

We still have much to do. Where we missed targets, we have revised our Key Strategic Actions to improve our performance. Amid all the details, we must continue to foster a culture of safety and strive to provide service where all of our riders and employees feel safe and secure.

Thanks to the State of Oregon, House Bill 2017 (HB2017) now provides more funding for transit. With this new funding, we introduced a Low-Income Fare for eligible adult riders. Already, more than 10,000 people have signed up for the program and are getting to work, medical appointments, and everything else they need while paying a smaller percentage of their household budget. In addition, we will be adding services and investments in areas with many low-income households. For the next four years, we plan to introduce more service each year, especially on bus routes with high ridership potential.

This year, TriMet turns 50! Back in 1969, a group of leaders from the Portland region went to Salem and asked for help to ensure the mobility and economic vitality of the region by creating a public transit agency. Now, 50 years later, we embrace the need to stay current, by expanding our relevance and benefit in the region. While we will always provide bus and rail service and pursue excellence in doing so, we also need to expand our role to help you connect to transit. In order to get you where you need to go, we want to offer a full range of options that includes transit. Now, at betaplanner.trimet.org, you can plan a trip to and from anywhere in the TriMet district and see options for buses and trains, but also for using a park & ride, biking, walking, Uber, ShareNow (formerly car2go), or Biketown. Then it links to those services online or your phone so you can book and pay for the ride too. Give it a try! We'll keep working to improve the way we help you combine and choose among the varied and growing options for getting around our great region.

A handwritten signature in blue ink, appearing to read 'Doug Kelsey', written over a light blue horizontal line.

Doug Kelsey
General Manager



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Introduction

As TriMet continues to grow, we must simultaneously maintain our current infrastructure and still be able to expand. New technology and innovation present opportunities and challenges. We have to closely coordinate our efforts within the agency and pursue priorities in a comprehensive, agency-wide manner. Having clearly defined Goals, Objectives, Measures, and Targets allows us to drive and measure progress. We celebrate our successes and strive to improve our Key Strategic Actions where we still have more to accomplish.

This Business Plan covers Fiscal Years FY2020 through FY2024 and will be updated annually with a rolling five-year horizon. The Business Plan and its strategic priorities will inform both the operating and capital budgets each year and vice-versa.

Strategic Priorities

For the next decade and more, TriMet will strategically pursue prioritized improvements and enhancements that help us live up to our Vision (see pages 8-10) and meet our Goals and Objectives. Considering equity in all of our activities and continuing to build a culture of safety to improve system safety and security for all mobility options, TriMet's strategic priorities (for roughly a 15 year horizon) are:

- Enhance customer experience and become a connector of peoples' lives and integrator of transportation choices
- Increase the share of trips in the region on transit and other low-impact and/or healthy options such as walking, biking, telecommuting, bikeshare, and similar mobility options
- Reduce customer travel times significantly, improving people's access to the needs in their lives
- Help counter global climate change threat by reducing carbon emissions from transportation in our region, including converting to a non-diesel bus fleet
- Support the Regional Transportation Plan and regional transportation funding efforts
- Improve system safety and security for all mobility options
- Optimize internal systems and processes including information technology
- Improve farebox recovery (which compares fare revenue and costs for a comprehensive cost-efficiency measure that also correlates with ridership productivity) and increase use and return on TriMet assets and value capture
- Improve state of good repair for TriMet assets
- Ensure TriMet is highly rated by the FTA and develop other 3rd party funding relationships to advance regional projects, such as Southwest Corridor, Division Transit Project, Red Line Extension, and reliability investments



Points of Emphasis for FY2020

In order to make real progress for FY2020, we must focus and emphasize specific efforts in this Business Plan and in the TriMet Budget. Again, considering equity in all of our activities and continuing to build a culture of safety, TriMet's points of emphasis for FY2020 are:

- New mobility opportunities and partnering to enhance mobility and connections to transit
- Implement near-term improvements that will increase ridership
- Reduce customer travel times and increase reliability
- Champion policies that give transit priority over single occupancy vehicles at cities, counties, Metro and ODOT
- Meaningful public engagement
- Safety and security presence on the system including fare enforcement
- Technology and process modernization, especially information technologies to make data more useful and our work more effective and efficient
- Personnel focus on the following issues: adequate staffing for operational excellence; implementing recommendations from employment diversity report; focus and investment in training; and workforce development
- Deliver HB2017-payroll-tax-funded services and benefits, including continuing to increase enrollment in the Low-Income Fare program
- Deliver capital program including design and funding steps for regional projects

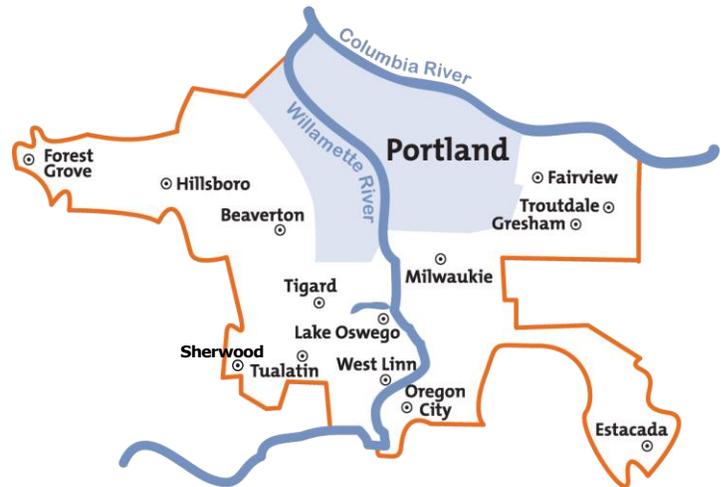
Serving the Community with this Plan

This Business Plan and its Goals and Objectives are informed by our ongoing efforts to understand the needs and desires of our riders as well as the broader community. We will continue to engage the diverse communities we serve as we implement and update this Plan, because they are the ultimate reason we strive for success.



About Us

- **Transit district created by Oregon law** serving over 1.5 million people in a 533-square-mile area
- **Primarily funded through an employer payroll tax, self-employment tax, and a recently-introduced employee payroll tax.** Fare revenues and some federal, state and local grants round out our budget
- **Governed by a seven-member board of directors**, who each represent a geographical district where they must reside



Our Customers

Riders:

- **Took more than 97 million boardings** on TriMet last year—adults, youth, seniors, and persons with disabilities
- **Comprise 68 percent** of the region’s adults who have ridden TriMet within the last year
- **82 percent have a car available** but instead choose TriMet
- Ride for **many different purposes** including work, school, medical appointments, shopping, going to special events or the airport, visiting friends, etc.

Regional communities benefit from:

- **Investing in our region’s transit and roads**, which will reduce projected congestion by half over the next 25 years
- **Generating nearly \$1.1 billion in economic benefits**, a return of \$2.40 for every \$1 spent
- MAX helping spur **more than \$21 billion in development value** within walking distance of MAX stations
- **Supporting mobility for residents** for work, education, medical visits, and other daily needs

Regional residents:

- **Encounter less congestion** thanks to people taking transit instead of driving in cars—45 percent of rush-hour commuters into downtown take transit
- **Breathe easier** with fewer cars on the road, resulting in cleaner air for the Portland area
- **Live healthier** by walking, rolling, or biking to transit
- **See benefits to our community and our earth** by promoting a smaller carbon footprint and lower reliance on fossil fuels

Regional businesses benefit, too:

- **Employers**—1,341 worksites or campuses offer TriMet pass programs, reducing the need to provide expensive parking
- **Retail and recreation**—more than half of our customers use transit for shopping and/or recreation for at least some of their trips
- **Freight**—addressing congestion means freight can move more freely on our roads and highways, saving more than \$150 million per year
- **Colleges and universities**—46 percent of Portland State University students, faculty, and visitors take transit to campus
- **Part of the region’s competitive livability** for talent in the global environment

Our Services

Buses

- Serve most of the metropolitan area and connect with MAX, WES, Portland Streetcar, and other bus services
- 85 bus lines, including 14 Frequent Service lines
- Ridership: Almost 57 million boardings (FY2018)

WES Commuter Rail

- Serves Beaverton, Tigard, Tualatin, and Wilsonville with weekday rush-hour service
- Five stations and 14.7 miles of track
- Ridership: over 400,000 boardings (FY2018)

Streetcar

- City of Portland owns track and cars; TriMet operators run the Streetcars
- Ridership: Over 4.8 million boardings (FY2018)

Mobility Information for Travelers

- **Multi-modal trip planner** including rail, bus, bike, walking, ridesharing and combined options: available now at betaplanner.trimet.org
- **Rider Support:** 503-238-RIDE(7433) call or text (text support is NEW!); 1-844-MyHopCard(694-6722); hello@trimet.org; [@trimethelp](https://twitter.com/trimethelp); [@myhopcard](https://twitter.com/myhopcard)
- **When the next train or bus will arrive at any stop:** trimet.org or by text: send stop ID # to 27299
- **Service alerts:** trimet.org/alerts and [@trimetalerts](https://twitter.com/trimetalerts)
- **Social media accounts:** [Facebook.com/trimet](https://www.facebook.com/trimet); [@trimet](https://twitter.com/trimet); [@ridetrimet](https://www.instagram.com/ridetrimet)

MAX Light Rail

- Connects Beaverton, Clackamas, Gresham, Hillsboro, Milwaukie, Portland, and Portland International Airport
- Five MAX lines stretching over 60 miles
- Ridership: almost 39 million boardings (FY2018)

LIFT Paratransit Service

- Provides door-to-door service for people with disabilities who are unable to ride TriMet's regular buses or trains
- Over 250 LIFT buses and 15 LIFT vans
- Ridership: about one million boardings (FY2018)

TriMet's Primary Roles in the Region

Providing service and projects that:

- **Support our economy:** Get employees to work and customers to businesses with integrated mobility options
- **Ease congestion:** Attract many riders to transit and encourage travel modes other than driving during peak periods by providing integrated mobility, coordinated information and the kinds of service and capital projects that lead to development and lifestyles that rely less on peak-period driving
- **Provide mobility for those with few options:** Provide a critical service for seniors, people with disabilities, school kids, low-income households, households without cars and others who have few mobility options by getting them to work, school and other destinations by transit or other accessible mobility options
- **Help shape the future of our region:** Deliver service, mobility options, and capital projects that help attract residents, businesses, and development to centers, main streets, and corridors that communities have identified as future growth areas
- **Reduce emissions and support environmental sustainability:** Deliver mobility options and support development that encourage mobility other than driving. Transit, walking, and bicycling especially promote personal and community health, and reduce resource use, greenhouse gases, and emissions in neighborhoods

Strengths, Weaknesses, Opportunities, and Challenges

Each year, we will refresh our understanding of our strengths and weaknesses, as well as the external forces and current circumstances that present both opportunities and challenges for us in achieving our vision, mission, and goals. This is a district-wide effort.

Strengths

- System safety is a value at TriMet
- Mission-driven work
- HB2017 new funding from state
- Strong revenue base for the Plan period
- Overall positive public support of TriMet
- Proven ability to expand
- Regional thought leader and influencer
- Accessible, open data with good supporting information technology infrastructure
- Progress on providing more comprehensive information to customers about options for traveling within the region
- Demonstrated effective capital planning process
- New ridership pattern information from Hop Fastpass®
- Support from Congressional delegation and state leadership
- First Special Tax Revenue Bond to receive highest ratings from Moody's (Aaa), S&P (AAA) and Kroll (AAA)
- Demonstrated desire to work across departments and divisions
- Improved average age of bus fleet
- Good Hop Fastpass® adoption rate and introduction of virtual pay
- Low-Income Fare rapidly gaining customers
- Enterprise Content Management System being implemented
- High level of pension funding
- Positive Train Control on WES fully functional and operating

Weaknesses

- Have not yet fully achieved a culture of safety
- Many competing needs for capital and operating resources
- Retirements leading to loss of institutional knowledge
- Workload, expectations, and staff capacity not consistently well matched
- Administration, maintenance and parking space is near capacity
- Physical separation of administration employees and operations employees hinders communication and teamwork
- Inconsistent internal understanding of what it means to provide excellent customer service
- Dispersed and not fully coordinated data collection, management, and document sharing
- TriMet is in the early stages of refining systems to better deliver large numbers of small capital projects
- Training needs at all levels
- Incomplete employee understanding of leadership decisions
- Incomplete internal resources for communicating with our riders and communities with limited English proficiency
- Capital asset maintenance and replacement needs
- Still developing succession planning and technical capacity
- Lack of communication about career advancement opportunities within TriMet

Opportunities

- Strong public and jurisdictional support for existing and expanded public transit
- Increased payroll tax funding
- New technologies available for data analysis, information, and communication
- External partnerships, including transit agency peers
- Pursue and leverage new technologies available for productivity and new services
- Open source and open data community connections
- Increased security on the system
- Growth of Transportation Network Companies (TNC) and other travel options may help solve “last mile” challenges
- Autonomous vehicle technology and potential for safety benefits
- Support at federal level (Federal Transit Administration and Congress)
- Further Transit Oriented Development leveraging
- Reputation based on proven project delivery history
- Ability to leverage strong brand
- Potential for 3rd party commercial revenue generating opportunity
- Regional and local growth policies
- Bus-only lanes and other transit prioritization
- High percentage of choice riders
- Further expand diversity of TriMet staff and contractors
- Light rail fleet replacement and remanufacturing
- Advances in clean fuel technology
- Advance opportunities to collaborate with Union leadership

Challenges

- Competing regional demands and priorities
- Decline in ridership and shifts in location of demand
- Safety of employees who provide direct service to customers
- Congestion and increasing bus travel times
- Maintaining reliability and addressing crowding challenges
- Operating complexity and/or cost of some services
- Competitive local labor market (especially information technology and other technical positions)
- Uncertainty of federal funding due to shutdowns
- Perception of level of safety and security for riders
- Limitations on resources to meet customer demand for latest technology products and services
- High customer expectations of service levels and service capacity
- Impact of some riders on comfort of others
- Changing political and regulatory environment
- Portions of service area lacking sidewalks or with inaccessible crossings and sidewalks
- Significant but rare event resiliency (e.g., earthquakes)
- Cybersecurity
- Maintaining consistent coordination with local partners to help transit operate more efficiently with less delay
- Concerns about facilities and projects from nearby residents
- High project-related real estate costs
- Growth of TNCs and other mobility options could be destabilizing
- Waning public trust in government and large institutions
- Quick and timely delivery of service and facilities
- Providing high-quality, cost-effective accessible service for those with limited mobility
- Potential risk of major safety incident (e.g., train derailment)
- Robust local and transit industry construction demand creates price and delivery risk for TriMet capital projects
- Asset maintenance and replacement impacts available budget
- Potential significant economic downturn
- High expectations about TriMet’s ability to deliver community improvement and transformation including sidewalks, housing, and place making
- Uncertainty in clean fuel technology
- Aging population and changing ridership patterns

Premises

Agency

- TriMet vision, mission, and values continue to guide TriMet
- TriMet will strengthen its culture of safety
- Expect no significant change to TriMet governance

Requirements

- TriMet will meet or exceed all regulatory obligations at federal, state, and local levels

Cost Effectiveness

- All proposed actions will be informed by the need to ensure cost effectiveness and risk mitigation

Growth

- Population and employment growth continues in the same general pattern using Metro's projections
- Service needs and expectations of the region and employers are that annual service growth will average about 2.1 percent or more plus additional HB2017-funded service, with modest LIFT growth of two percent or less

Economy

- Regional growth will continue
- Fuel/energy prices will stay relatively stable over the five-year horizon
- No major increases in the unemployment rate

Financial

- TriMet expects to use state funding provided by HB2017 to expand service (especially to low-income communities), buy battery electric buses, assist in building needed facilities to support growth, facilitate Community/Job Connectors, and provide for the Low-Income Fare program
- Emphasis on State of Good Repair needs to continue
- Federal and state funding and oversight will remain relatively constant
- TriMet maintains its excellent bond rating
- Strategic Financial Plan Guidelines remain in force

Service

- Service will grow and respond to changing demographics in various communities in the region
- TriMet continues to focus on its vital culture of safety as well as on-time performance for rail and bus

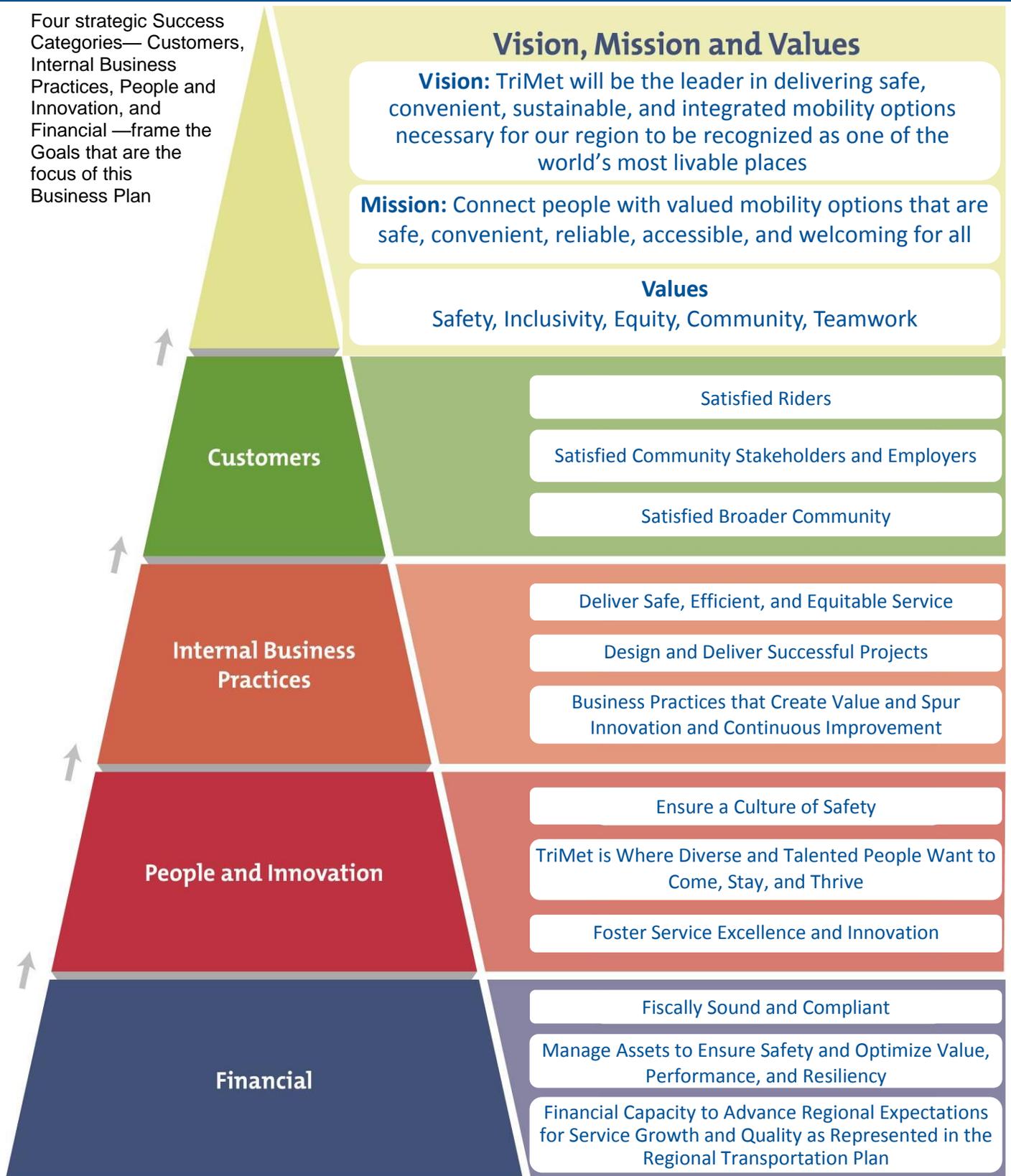
Vehicle Technology

- Fleet mix – TriMet continues to operate mostly 40-foot buses. TriMet will add articulated buses for the Division Transit Project and will consider articulated buses for other lines
- TriMet has adopted a Non-Diesel Bus Plan¹ which calls for shifting to non-diesel buses with a trial period between now and 2023. For 2024 and beyond, TriMet would no longer purchase any diesel buses and by 2040 there would be no diesel buses left in the fleet
- Autonomous vehicle technology offers some opportunities and potential challenges which require more exploration

¹ <http://trimet.org/electricbuses/pdf/TriMet-Non-Diesel-Bus-Plan-September-2018.pdf>

Strategy Map

Four strategic Success Categories— Customers, Internal Business Practices, People and Innovation, and Financial —frame the Goals that are the focus of this Business Plan



Vision, Mission, and Values

Everyday transportation options are changing, and the transit industry is developing better tools to integrate all those options. TriMet will always operate buses and MAX and provide transportation for seniors and persons with disabilities, but we also must offer our customers convenient connections to and from transit and help as many people in our region as possible to navigate to their best options. TriMet's Vision, Mission, and Values needed a refresh to better reflect the future challenges and opportunities.

How did TriMet develop these statements?

Sources of input for the updated Vision, Mission, and Values include the following:

- Board Guidance
- Internal – TriMet employees, including a survey with 190 responses
- External – Riders, Stakeholders, and Community, including the Committee on Accessible Transportation, the Transit Equity Advisory Committee, and community organizations.

What changed?

The new statements are as follows:



TriMet is our community's life connector. We span the growing region with bus, MAX light rail, WES commuter rail, and LIFT paratransit for persons with disabilities while connecting to other services including Portland Streetcar, other bus systems like C-TRAN, local shuttles, and newer mobility options such as Uber, Lyft, eScooters, bikeshare, etc.

The vision calls for TriMet to be the leader in providing transit and connecting people to their many mobility options. By doing so, we will play our part in helping make this region one of the world's most livable places for everyone in our region.

The updated mission recognizes the wider variety of options people now have available to travel. Our core services will continue to be bus, rail, and paratransit, but as explained on the next page and encapsulated in the graphic on the next page, there are many options that our customers can connect to now. Our mission is to provide great transit service, improve access to transit, and help connect people to mobility options that are safe, convenient, sustainable, integrated with each other, and welcoming to everyone who travels within our region.

Our values...

Safety: We must include our safety values in everything we do.

Inclusivity: Our service and our decision-making should include the needs and input of our customers, our stakeholders, and the public.

Equity: We're dedicated to making our transit system a place where all are welcome and are treated with dignity and respect. More than that, we proudly use equity as a lens to help guide our decisions in ways that benefit those who most need it.

Community: The boldness of our vision stems from our commitment to improving this region. We support communities throughout the region with service, amenities, projects, and engagement.

Teamwork: Working together as a team, TriMet employees are committed to improving our customers' experiences. We all strive for collegiality, collaboration, and to honor everyone's contributions.

What does this change mean?

Our Vision, Mission, and Values guide our future efforts to serve our customers better. We want to be the leader in delivering safe, convenient, sustainable, and integrated mobility options that help people get where they need to go. We'll keep working hard to make our services more convenient for our current and future customers, more sustainable, and to help people navigate all the mobility options out there to best fit their needs. This is not a big change from before; the updated Vision, Mission, and Values simply better reflect the direction that we were already starting to pursue. The transit industry is improving integration with mobility options and TriMet needs to do the same to serve our region and push toward our Vision.

The graphic below shows the modes we operate in the center blue oval, and the blue arrows show the modes our customers can connect to with our new multi-modal trip planner (now available to the public in a beta version at <http://betaplanner.trimet.org>). Over time, we expect to add more modes and make it easier for our customers to make all of the connections they need.



Goals, Objectives, Measures, Targets, and Key Strategic Actions

The following pages identify Objectives, Measures, Targets, and Key Strategic Actions designed to make smart, measurable progress on each of the Goals. In the following tables, you will find:

- Goals – Statements of expected or desired achievements or outcomes.
- Objectives – More specific statements of Goals in a way that is actionable and leads to Measures, Targets, and Key Strategic Actions.
- Measures – Quantitative or qualitative methods of identifying the status of a given issue.
- Targets – Specific planned-for performance on Measures. Each Measure has an associated Target to ensure that the Business Plan is focused and leads to a clear indication of whether targets are being met (and therefore demonstrate that chosen actions are effective).
- Key Strategic Actions – Specific actions identified to make progress toward Targets.

Our Strategy Map gives structure to Goals of the overall TriMet Business Plan. On the following pages, Objectives, Measures, Targets, and Key Strategic Actions provide more clarity about where we are making progress. We will coordinate the efforts, sub-goals, and actions of all TriMet departments so that our efforts are aligned at each level.

Simple icons showing our status and a description of results.

A list of acronyms and definitions for terms used in the Objectives, Measures, Targets, and Key Strategic Actions is included at the end of this Plan.



New battery electric bus now in service with overhead charger at Sunset Transit Center

Customers Goals

Our customers ultimately determine the success of our efforts. While more than two-thirds of adults in the region ride TriMet at least occasionally, even those who don't ride still benefit. By providing transit, we also provide benefits to employers, community stakeholders, and to the broader community. Along with our riders, they have expectations for TriMet in terms of congestion, environmental, and community benefits, so we have also included them here.

CUSTOMERS GOAL 1: Satisfied Riders

OBJECTIVE	STATUS	RESULTS
1. Provide safe service	 Deployment strategy in development but not complete	<ul style="list-style-type: none"> ✓ Public safety and security advisory committee formed and meeting ▪ Developing scope of work informed by initial recommendations from safety and security advisory committee ▪ Security presence on system increasing during FY2019 ▪ Customer experience audit and benchmarking completed ▪ Working with union to implement eighth camera in buses; timing uncertain ▪ Developing training programs for TriMet in-field staff on de-escalation and mental health first aid for implementation in FY2020 ▪ 74 percent of bus riders and 72 percent of MAX riders say they feel safe or very safe on board
	MEASURE / TARGET	KEY STRATEGIC ACTIONS
	Implement deployments based on strategy during FY2020	<ul style="list-style-type: none"> ▪ Continuously engage with community groups and riders to meet safety needs on board and at TriMet facilities ▪ Develop and deliver a code of conduct/ civility campaign ▪ Implement updated security deployment consistent with needs and community engagement in the field during FY2020 ▪ Develop quarterly reporting for safety and security committee on fare enforcement program ▪ Implement eighth camera with audio in buses

 = on target
  = caution
  = off target
 ✓ = completed Key Strategic Action

CUSTOMERS GOAL 1: Satisfied Riders

OBJECTIVE	STATUS	RESULTS
2. Increase ridership	 Average weekly boardings down 0.7 percent ²	<ul style="list-style-type: none"> ✓ Market segmentation analysis completed. ▪ Bus service budget increased 4.7 percent during FY2019 ▪ Service improvements included introducing first over-night service in over 30 years, spanning from Gresham to Forest Grove, adding Line 73 to the Frequent Service network, a new bus line in Clackamas County, new bus connection between NE Portland and downtown across the Fremont Bridge, and other enhancements. ▪ Completed HB2017 plan with approval from state to enhance service, make investments in service growth, purchase battery electric buses, and offer Low-Income Fare program ▪ Enhanced outreach regarding Hop Fastpass® for Latinx and Asian communities ▪ Community/Job Connector program developed as part of HB2017 planning process to help address first- and last-mile connection needs. ▪ Developed near-term ridership strategy and started implementation in FY2019 ▪ Multiple bus lane and intersection treatments installed in partnership with City of Portland, reducing travel times, improving reliability, and minimizing delays to bus riders ▪ Created Transit-Oriented Development department to leverage TriMet assets and increase development near transit that will contribute to ridership with recent efforts expected to ultimately yield up to 950 housing units, including over 500 affordable units ▪ Individualized marketing completed around WES and included in new resident kits for new apartment residents across the region.
	FY2019	
	MEASURE / TARGET	KEY STRATEGIC ACTIONS
	Stabilized or increased boardings: FY2020 2 percent annual percentage increase in boardings for bus and MAX: FY2022	<ul style="list-style-type: none"> ▪ Develop strategies to increase ridership compared to regional growth, including: <ul style="list-style-type: none"> ○ Target service enhancements in locations that will address changing demands ○ Personalized marketing programs (e.g., new resident information or tourist-focused automated tours) ○ Increase employer fare program participation ○ Broaden multicultural marketing strategies ○ Develop enhanced first- and last-mile strategies for coordination with other transportation options ○ Coordinate safety and security with customer service and ambassador deployment to enhance sense of security and increase ridership ▪ Enhance high-demand service with HB2017 funding that will result in significant ridership increases ▪ Implement strategy for TriMet's support of Transit-Oriented Development equitable housing and for value capture that supports higher transit demand around existing MAX, DTP, and Frequent Service
	FY2020 - FY2024	

² for FY 2019 through February compared to FY2018

 = on target	 = caution	 = off target	 = completed Key Strategic Action
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CUSTOMERS GOAL 1: Satisfied Riders

OBJECTIVE	STATUS	RESULTS
3. Improve overall customer experience	 Customer experience audit complete and customer experience work plan under development based on findings	 Established public safety and security advisory committee to incorporate community feedback into safety and security strategies and identified benchmarks <ul style="list-style-type: none"> ▪ Now providing 24-hour/7-days-a-week customer information support via text ▪ Agency-wide customer experience training under development
	 2.8 customer complaints ³ about personal safety and security per 100,000	
	MEASURE / TARGET	KEY STRATEGIC ACTIONS
	Set of measures related to customer experience developed: FY2020, based on customer experience audit and comparison to peers 2.8 or fewer customer complaints about personal safety and security per 100,000 boardings	<ul style="list-style-type: none"> ▪ Implement customer experience work plan results in late FY2019 and in FY2020 ▪ Increase visibility and frequency of customer service personnel on the system ▪ Improve cleanliness of vehicles ▪ Expand customer information through technologies that support chat function by early FY2020 ▪ Begin providing agency-wide customer experience training in FY2020

FY2019

FY2020 - FY2024

³ FY2019 to date as of end of March 2019

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CUSTOMERS GOAL 1: Satisfied Riders

OBJECTIVE	STATUS	RESULTS
4. Ensure equitable distribution of services and resources across the TriMet system	FY2019 ↑ Revenue hours provided ↑ Vehicle loads ↑ On time performance ↑ Service availability ↑ Vehicle assignment – Bus ↑ Vehicle assignment – MAX <i>Stop amenities:</i> ↑ Seating ↑ Lighting ↑ Elevators ↑ Digital displays ↑ Shelters ↑ Signs, maps and/or schedules ↑ Waste receptacles	✓ Addressed FY2018 disparity finding by relocating bus fleets between garages and retiring older buses. These actions improved the equitable distribution of newer buses being assigned between minority/low-income lines and non-minority/higher income lines. The vehicle assignment measure moved from within 20 percent (off target) to within 5 percent (on target) ✓ Completed all Board hiring objectives for General Manager ⁴ including those related to equity <ul style="list-style-type: none"> ▪ All minority and/or low-income lines are better than, equal to, or within 5 percent of non-minority and/or non-low-income lines on all measures ▪ Enhanced bus service in neighborhoods with high concentrations of persons of color and/or low-income ▪ Implemented Low-Income Fare program and engaged with communities of color and/or low-income in the region to provide the Low-Income Fare to those eligible ▪ Added an equity criterion into evaluation scoring process for capital project proposals
	FY2020 - FY2024 Minority and low-income access within five percent or better than non-minority and non-low-income access across different measures: <ul style="list-style-type: none"> ▪ Revenue hours provided ▪ Vehicle loads ▪ On time performance ▪ Service availability ▪ Vehicle assignment ▪ Stop amenities 	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Conduct annual review of service performance, vehicle assignments, and amenity distribution and implement needed service or amenity adjustments to reach equity targets ▪ Enhance outreach and engagement activities with communities of concern to ensure equity is a part of every significant decision for TriMet service and budget priorities ▪ Explore policies, procedures, and metrics to achieve equity lens for TriMet ▪ Update TriMet’s Language Access Plan during FY2020; implement FY2021 to FY2023

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⁴ <http://news.trimet.org/2018/02/trimet-board-of-directors-chooses-coo-doug-kelsey-as-agencys-next-general-manager/>

CUSTOMERS GOAL 1: Satisfied Riders

OBJECTIVE	STATUS	RESULTS
5. Improve customer information and services	 Implemented improvements under Customer Information Strategy	<ul style="list-style-type: none"> ▪ Improved overall quality and timing of service information to our customers, including adding text support ▪ Hop Fastpass® expanded to more customers ▪ Expanded Hop Fastpass® awareness outreach along with Low-Income Fare ▪ Beta version of enhanced multi-modal trip planner released March 2019 at betaplanner.trimet.org to improve customer information regarding trip planning and provide more mobility options for each trip using open-source information technology

MEASURE / TARGET	KEY STRATEGIC ACTIONS
Implementation steps for customer information strategy during FY2020	<ul style="list-style-type: none"> ▪ Implement enhanced information to customers through technology advances and communications strategies: <ul style="list-style-type: none"> ○ Minimize imprecise, global service messages ○ Deliver multi-year project to overhaul our existing digital information displays and introduce new and expanded digital components during FY2021–FY2023 ○ Develop strategy for on-board digital information displays ▪ Engage and educate about customer access to Hop Fastpass® ▪ Develop enhanced Hop Fastpass® customer value strategy, including potential mobility management opportunities that extend beyond directly provided service ▪ Enhance technology and partnership protocols to provide frictionless information, trip-planning and travel for customers
FY2020 - FY2024	

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CUSTOMERS GOAL 1: Satisfied Riders

OBJECTIVE		STATUS	RESULTS
6. Achieve market acceptance of Hop Fastpass® as a fare instrument	FY2019	 41.9 percent ⁵ of fares collected through Hop Fastpass®	<ul style="list-style-type: none"> Developed and released virtual card for Android users with a version for Apple iPhone and Watch available in 2019 Over 21 million taps with Hop Fastpass® since introduction with over 79,000 active Hop cards Low-Income Fare program implemented using Hop Fastpass® Now more than 500 retail locations carry Hop cards – compared to less than 150 for paper tickets before Implementing Hop Fastpass® for LIFT customers
	FY2020 - FY2024	MEASURE / TARGET 75 percent of fare revenue from Hop: by end of FY2022	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> Implement Hop Fastpass® roll-out plan and deliver key milestones on time Migrate annual, universal, and monthly passes to Hop during FY2020 Further integrate Hop Fastpass® for uses such as LIFT rides and Bike & Ride secure bike parking facility access

⁵ As of March 2019

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CUSTOMERS GOAL 2: Satisfied Community Stakeholders and Employers

OBJECTIVE	STATUS	RESULTS				
7. Help shape the future of cities and our region in line with Metro 2040 Growth Concept	<p><i>Access to housing and employment measures:</i></p> <ul style="list-style-type: none"> ↑ Housing near MAX (increased to 14.1 percent) ↑ Housing near Division Transit Project (increased to 3.9 percent) ↑ Housing near Frequent Service Bus (increased to 28.4 percent) ↑ Housing near all transit (increased to 86.5 percent⁶) ↑ Employment near MAX (increased to 27.9 percent) ↑ Employment near Division Transit Project (increased to 1.6 percent) ↑ Employment near Frequent Service bus (increased to 23.2 percent) ↑ Employment near all transit (increased to 93.1 percent) 	<ul style="list-style-type: none"> ▪ Created new Transit-Oriented Development department at TriMet to provide more focus and get more benefit from development around transit ▪ TriMet-owned land opportunities yielded eight projects with partners: <ul style="list-style-type: none"> ○ Two projects where TriMet sold land and one where TriMet is in negotiations to sell to a non-profit developer who will construct affordable housing adjacent to transit. Together, those projects are expected to provide nearly 500 affordable units with TriMet contributing by either discounting the price directly (within Federal Transit Administration constraints) or with likely savings by providing land through direct sale to a non-profit rather than a market-wide sales process ○ Five value capture projects in negotiations (see Objective 27) ▪ Executed agreement with partners supporting equitable development in Southwest Corridor ▪ Housing and employment development continues to occur around light rail and Frequent Service bus consistent with regional and local development strategies ▪ Added new bus line coverage, bringing more housing and jobs close to transit 				
	<table border="1"> <thead> <tr> <th data-bbox="443 971 863 1019">MEASURE / TARGET</th> <th data-bbox="863 971 1980 1019">KEY STRATEGIC ACTIONS</th> </tr> </thead> <tbody> <tr> <td data-bbox="443 1019 863 1278"> Percentage and/or volume of housing development and employment within walking distance of MAX, Division Transit Project, and Frequent Service bus greater than or equal to previous year </td> <td data-bbox="863 1019 1980 1278"> <ul style="list-style-type: none"> ▪ Implement strategy for TriMet's support of Transit-Oriented Development equitable housing and for value capture that supports transit around MAX, Division Transit Project, and Frequent Service bus, including management of real property and underutilized Park & Ride lots ▪ Pursue development of Southwest Corridor Project as described in Objective 21 </td> </tr> </tbody> </table>	MEASURE / TARGET	KEY STRATEGIC ACTIONS	Percentage and/or volume of housing development and employment within walking distance of MAX, Division Transit Project, and Frequent Service bus greater than or equal to previous year	<ul style="list-style-type: none"> ▪ Implement strategy for TriMet's support of Transit-Oriented Development equitable housing and for value capture that supports transit around MAX, Division Transit Project, and Frequent Service bus, including management of real property and underutilized Park & Ride lots ▪ Pursue development of Southwest Corridor Project as described in Objective 21 	
MEASURE / TARGET	KEY STRATEGIC ACTIONS					
Percentage and/or volume of housing development and employment within walking distance of MAX, Division Transit Project, and Frequent Service bus greater than or equal to previous year	<ul style="list-style-type: none"> ▪ Implement strategy for TriMet's support of Transit-Oriented Development equitable housing and for value capture that supports transit around MAX, Division Transit Project, and Frequent Service bus, including management of real property and underutilized Park & Ride lots ▪ Pursue development of Southwest Corridor Project as described in Objective 21 					

⁶ Due to improvements in methodology, some corrected numbers are below those reported last year. This applies to numbers for housing near all transit, employment near Division Transit Project, and employment near all transit. Previous year results were also updated using the improved methodology. For all measures, this year's performance does represent a real increase over the previous year.

 = on target	 = caution	 = off target	 = completed Key Strategic Action
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CUSTOMERS GOAL 2: Satisfied Community Stakeholders and Employers

OBJECTIVE	STATUS	RESULTS
8. Ease congestion by providing attractive travel options during peak periods	<div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; background-color: yellow; margin-right: 5px;"></div> 29.4 percent⁷ of travelers in Banfield and Sunset corridors during peak hour in peak direction rode MAX (down from 29.6 percent) </div>	<ul style="list-style-type: none"> ▪ Total peak hour, peak direction travelers in Banfield and Sunset corridors on MAX grew compared to previous count, as did estimated total people in cars at the same points ▪ Red Line project further defined through public review and design refinement. Locally Preferred Alternative expected to be considered by TriMet Board in April 2019 ▪ Engaged community regarding Red Line Extension and Reliability Project through community meetings, one-on-one conversations with nearby community members, and online information ▪ Added peak hour bus service on multiple lines ▪ Developed procurement process that will include options for additional higher capacity buses beyond Division Transit Project
	<div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; background-color: yellow; margin-right: 5px;"></div> Percentage of travel on MAX as percent of all travel in Banfield and Sunset corridors during peak period equal to or greater than previous year⁸ </div>	<div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; background-color: yellow; margin-right: 5px;"></div> Pursue Red Line extension to Fairplex and MAX system improvements to Gateway and Airport tracks through Small Starts or other federal program </div> <ul style="list-style-type: none"> ▪ Introduce higher capacity buses into service when and where appropriate during the next five years

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⁷ Data comparing Oregon Department of Transportation traffic counts with TriMet peak MAX ridership, both in Fall 2018

⁸ Measure under review and may be changed in future reports

CUSTOMERS GOAL 2: Satisfied Community Stakeholders and Employers

OBJECTIVE	STATUS ⁹	RESULTS
9. Support the region's economy by expanding employee access to jobs and customer access to businesses	FY2019  93.1 percent of employment within walking distance of transit (up from 92.8 percent)  97.0 percent of retail within walking distance of transit (up from 96.9 percent)	 Completed final HB2017 plan before state deadline <ul style="list-style-type: none"> ▪ Introduced Low-Income Fare¹⁰ program through Hop Fastpass® to be paid for with new state funding from HB2017. Over 10,000 users signed up for Low-Income Fare ▪ Supported additional development near MAX stations (see Objectives 7 and 27) ▪ Implemented bus priority in multiple locations with City of Portland in regional Enhanced Transit Concept process to improve bus operations and encourage additional development along frequent transit lines ▪ Explored options with partners for grant applications to operate pilot autonomous vehicle shuttle services and represented needs for transit in Oregon Department of Transportation autonomous vehicle Task Force ▪ Representing needs for transit on statewide autonomous vehicle task force
	FY2020 - FY2024 MEASURE / TARGET Percent of employment accessible by transit equal to or greater than previous year Percent of retail accessible by transit equal to or greater than previous year	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ With HB2017 committee approval, expand non-TriMet shuttle program to help address first- and last-mile needs ▪ Continue outreach to expand use of Low-Income Fare program ▪ Pursue and implement partnerships to provide mobility in low-productivity, lower-demand areas and times of day when demand is not high enough to provide cost-effective TriMet fixed-route service. Assess feasibility and, if promising, develop and implement pilot partnership for non-TriMet program during FY2020 ▪ Develop steps with partners to implement future pilot using autonomous vehicle technology

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⁹ Due to improvements in methodology, current year corrected numbers are below those reported last year. Previous year results were also updated with the new methodology. This year's performance does represent a real increase over the previous year.

¹⁰ <http://trimet.org/lowincome>

CUSTOMERS GOAL 2: Satisfied Community Stakeholders and Employers

OBJECTIVE	STATUS	RESULTS
10. Advance mobility for those with limited options	<p>FY2019</p> <ul style="list-style-type: none">  Projected 15.7 million¹¹ boardings on fixed route service by seniors and persons with disabilities (down from 15.9 million)  LIFT customer satisfaction with service provided: 91 percent  Cost per ride on LIFT service increased 2.8 percent (which was slightly above inflation¹²) 	<ul style="list-style-type: none"> ▪ LIFT strategy under development and on-track for completion by end of FY2019 ▪ Hop Fastpass® implementation for LIFT customers begun in FY2019 ▪ 38% of Hop Fastpass® taps during the past year were for Honored Citizen customers as of March 2019 ▪ Partnering with Ride Connection to allow retired TriMet LIFT vehicles to be used by community organizations to provide their own rides to service recipients ▪ LIFT/Cab boardings are down due to closure of worksites for persons with disabilities by state-funded entities and TriMet is working to support getting persons with disabilities to their new places of employment
	<p>FY2020 - FY2024</p> <p>Boardings for seniors and persons with disabilities provided on fixed route service equal to or greater than previous year</p> <p>Customer satisfaction rating on LIFT equal to or greater than previous year</p> <p>Cost/ride on LIFT service at or below targeted budget amount</p>	<p>KEY STRATEGIC ACTIONS</p> <ul style="list-style-type: none"> ▪ Increase flexibility of services and tools for riders <ul style="list-style-type: none"> ○ Automated call-back function for LIFT riders ○ Achieve full Hop Fastpass® integration for LIFT and cab service by FY2021 ▪ Complete LIFT strategy by end of calendar 2019 and begin implementation during FY2020 ▪ Implement pilot project for demand responsive service for seniors and persons with disabilities. Begin work in FY2020 following engagement with riders and public

¹¹ Projected based on current trends as of February 2019

¹² Twelve-month average as of February 2019, compared to 2.3% February 2019 year-over-year Consumer Price Index for Urban (CPI-U) Consumers Western US size class B/C cities rate at <http://www.bls.gov/regions/west/data/xg-tables/ro9xg01.htm>

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CUSTOMERS GOAL 2: Satisfied Community Stakeholders and Employers

OBJECTIVE	STATUS	RESULTS
11. Improve environmental performance and stewardship	 Board adopted strategy for transition to non-diesel buses, starting with new battery electric bus purchases during this five-year period	<ul style="list-style-type: none"> ▪ TriMet Board adopted Non-Diesel Bus Plan ▪ Five battery electric buses received and expected to be in service before end of FY2019 ▪ 64 new buses being received in FY2019, most replacing buses as much as 21 years old, resulting in lower emissions ▪ Energy efficiency improvements made at the Elmonica Rail Maintenance Facility to reduce carbon emissions and improve energy efficiency of operations at our facilities
	MEASURE / TARGET Progress on implementation of Non-Diesel Bus Plan	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Implement TriMet Non-Diesel Bus Plan, including: <ul style="list-style-type: none"> ○ Finalize scope and designs for battery electric bus charging infrastructure at Powell and future Columbia Garage including Public Utilities partnerships ○ Pursue purchase of additional battery electric buses ○ Pilot retrofitting existing vehicles with battery electric bus systems or other more fuel efficient diesel options

FY2019

FY2020 - FY2024

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CUSTOMERS GOAL 3: Satisfied Broader Community

OBJECTIVE	STATUS	RESULTS
12. Ensure strong support for transit and TriMet	FY2019  Overall public approval ¹³ rating for TriMet at 75 percent (81 percent for riders)	 Completed all Board objectives for General Manager ¹⁴ <ul style="list-style-type: none"> Approval rating improved since last year and above 80 percent for riders, but not yet meeting target of 80 percent for all respondents (including non-riders) Engaged public and provided information about budget development, Service Enhancement Plans, Annual Service Plans, and transit improvement projects such as Division Transit Project, Southwest Corridor Project, MAX Red Line Improvements Project, fourth bus garage, and more than a dozen other, smaller projects scattered across the district
	FY2020 - FY2024 Approval rating at or above 80 percent in Attitude & Awareness survey (combined riders and non-riders)	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> Enhance opportunities for public engagement and incorporate stakeholder and community needs in planning and decision-making with emphasis on low-income and minority engagement Provide to voters facts, data, and information that demonstrate the clear need for additional public transportation investment

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¹³ Respondents who “strongly approve” or “somewhat approve” of “the job TriMet is doing”, 2018 TriMet Attitude and Awareness survey

¹⁴ <http://news.trimet.org/2018/02/trimet-board-of-directors-chooses-coo-doug-kelsey-as-agencys-next-general-manager/>

CUSTOMERS GOAL 3: Satisfied Broader Community

OBJECTIVE	STATUS	RESULTS
13. Increase funding for regional mobility expansion	 Completed Division Transit Project Finance Plan	<ul style="list-style-type: none"> ✓ Completed funding plan of all non-federal funds for Division Transit Project ▪ Continuing to pursue federal funding from Federal Transit Administration for remainder of Division Transit Project ▪ Secured pledge of \$25 million in state proposed budget from Governor for Southwest Corridor Project
	MEASURE / TARGET Needed investments in Southwest Corridor obtained: FY2021	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Ensure public has full access to information, data, and facts demonstrating need for additional light rail, transit, and transportation investment, especially in the Southwest Corridor

FY2019

FY2020 - FY2024

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Internal Business Practices Goals

INTERNAL BUSINESS PRACTICES GOAL 1:

Deliver Safe, Efficient, and Equitable Service

OBJECTIVE	STATUS	RESULTS
14. Increase personal safety	FY2019 1.3 passenger injuries per million boardings No preventable deaths occurred Rail Safety Audit closed, with all action items addressed <i>Collisions per 100,000 miles¹⁵:</i> Bus: 2.9 MAX: 1.7 LIFT: 1.0 WES: 0.1	<ul style="list-style-type: none"> Completed all action items from rail safety audit successfully Completed Safety Management System Plan ▪ Installed improvements to reduce MAX right-of-way intrusions by cars ▪ Now incorporating trend analysis to prioritize enhancements to keep pedestrians away from rail right-of-way ▪ Implemented Positive Train Control on WES, improving safety and meeting Federal Railroad Administration requirement on time
	FY2020 - FY2024 MEASURE / TARGET 1.9 or fewer passenger injuries per million boardings Zero preventable deaths <i>Collisions per 100,000 miles</i> <ul style="list-style-type: none"> ▪ Bus: 2.6 ▪ MAX: 1.3 ▪ LIFT: 1.3 ▪ WES (per year): <1 	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Submit fully FTA-compliant Public Transportation Agency Safety Plan to Oregon Department of Transportation before July 20, 2020 ▪ Develop or procure Safety Management System tracking system ▪ Increase employee and contractor high-visibility presence on system ▪ Continue treatments to reduce MAX right-of-way intrusions

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¹⁵ Twelve-month average as of February 2019.

INTERNAL BUSINESS PRACTICES GOAL 1: Deliver Safe, Efficient, and Equitable Service

OBJECTIVE	STATUS	RESULTS
15. Provide reliable performance	FY2019	<p>On-time performance:</p> <ul style="list-style-type: none"> ↑ Bus: 86.9 percent¹⁶ ↑ MAX: 89.0 percent ↓ LIFT: 91.2 percent¹⁷ ■ WES: 94.3 percent <ul style="list-style-type: none"> ▪ Again improved on-time performance for both bus and MAX ▪ Rewrote bus preventive maintenance program with levels to emphasize predictive and preventive maintenance. This will reduce in-service breakdowns ▪ Replacing components on Type 2 and 3 MAX cars to reduce service disruptions ▪ Completed multiple projects to reduce heat-related speed restrictions, reducing delays during hot weather ▪ Adjusted and aggressively managed departures from layover locations to improve on-time performance and added reserve vehicles to fill service gaps when needed ▪ WES achieved 99.9 percent on-time performance during the month of January 2019

	MEASURE / TARGET	KEY STRATEGIC ACTIONS															
FY2020 - FY2024	<p>On-time performance – percentage of trips on schedule (less than one minute early and no more than five minutes after scheduled time)</p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th></th> <th>FY2020</th> <th>FY2022</th> </tr> </thead> <tbody> <tr> <td>Bus</td> <td>83.8 percent</td> <td>85 percent</td> </tr> <tr> <td>MAX</td> <td>88 percent</td> <td>90 percent</td> </tr> <tr> <td>LIFT</td> <td colspan="2">93.5 percent</td> </tr> <tr> <td>WES</td> <td colspan="2">95 percent</td> </tr> </tbody> </table> <p>On-time performance on minority and low-income lines better than or within 5 percent of non-minority and non-low income lines</p>		FY2020	FY2022	Bus	83.8 percent	85 percent	MAX	88 percent	90 percent	LIFT	93.5 percent		WES	95 percent		<ul style="list-style-type: none"> ▪ Implement agency-wide, multi-faceted projects and operations enhancements for improving the service and maintenance components that contribute to on-time performance (especially vehicle reliability and switch reliability) ▪ Complete and implement internal information technology strategic plan in FY2020 and FY2021
	FY2020	FY2022															
Bus	83.8 percent	85 percent															
MAX	88 percent	90 percent															
LIFT	93.5 percent																
WES	95 percent																

¹⁶ Bus and MAX performance numbers are FY19 average through February 2019

¹⁷ LIFT and WES performance numbers are 12 month average through February 2019

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INTERNAL BUSINESS PRACTICES GOAL 1: Deliver Safe, Efficient, and Equitable Service

OBJECTIVE	STATUS ¹⁸	RESULTS
16. Improve service delivery	FY2019  156.9 miles of MAX and Frequent Bus lines  1.9 percent overloaded peak trips on MAX and Bus (down from 2.1 percent)  13.6 mph on bus (down from 13.7)  17.9 mph on MAX (down from 18.0)  Vehicle loads on minority and low-income lines as good or better than non-minority and non-low income lines	<ul style="list-style-type: none"> ▪ Enhanced Line 73 – 122nd Ave to Frequent Service and added new Line 31 ▪ Introduced all-night service on Lines 20 and 57 and the new Line 272 – the first all-night transit service in the region for over 30 years ▪ Line 24- Fremont extended in March 2019 into NW Portland and to Goose Hollow for new northeast-to-west transit connection and added weekend service ▪ Acquired land and began design for fourth bus garage ▪ Reduced road calls that take buses out of service, reducing disruptions of customer trips ▪ Multiple bus priority treatments in City of Portland installed to improve travel times ▪ Began pilot project for Portland Urban Data Lake (regional transportation data storage) with partners ▪ Rail operations optimization technology data being used to tweak MAX schedule for enhanced accuracy ▪ Selected Enterprise Content Management System and started multi-year roll-out ▪ Downtown MAX average speed declined slightly to 7.19 mph
	FY2020 - FY2024 MEASURE / TARGET Number of miles of Frequent Service (bus and MAX) lines equal to or greater than previous year 2 percent or fewer overloaded weekday peak trips, MAX and Bus Average miles per hour including passenger stops for Bus and MAX greater than or equal to previous year Vehicle loads on minority and low-income lines better than or within 5 percent of non-minority and non-low income lines Milestones of delivery for Enterprise Content Management System	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Develop operations and travel time improvements strategy for rail and bus including Internet of things/Smart Cities strategies ▪ Begin construction on the fourth bus garage ▪ Expand service with HB2017 funding, with enhanced service to low-income communities, including service to East Portland and East Multnomah County in FY2020 ▪ Design and implement bus and rail operations improvements including signal, street improvements, and operating procedure improvements ▪ Develop comprehensive service assessment including Service Planning and Scheduling Best Practices review and implement key identified best practices and recommended actions for fixed route and LIFT ▪ Develop and implement agency-wide solutions for technology modernization to improve data analysis and information sharing: <ul style="list-style-type: none"> ○ Implement enterprise content management system ○ Coordinate data analysis and reporting across TriMet and pilot information technology tools ▪ Implement pilot project for Portland Urban Data Lake in FY2020 ▪ Complete first step of agency-wide facilities master plan during FY2020

¹⁸ As of late calendar year 2018.

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INTERNAL BUSINESS PRACTICES GOAL 1: Deliver Safe, Efficient, and Equitable Service

OBJECTIVE	STATUS	RESULTS
17. Ensure cost-effective service	FY2019  Bus Cost per vehicle hour increased 6.9 percent ¹⁹  MAX Cost per vehicle hour increased 13.3 percent  WES Cost per vehicle hour decreased 3.2 percent  LIFT Cost per vehicle hour increased 3.7 percent	<ul style="list-style-type: none"> Implemented new bus preventive maintenance practices that will improve reliability with less breakdowns Implemented more cost-effective bus spare ratio Bus, MAX and LIFT cost per vehicle hour exceeded inflation²⁰ WES cost increase stayed below inflation Integrated Business Plan Goals and Objectives more directly into annual operations budget decision-making to keep investments focused on meeting priority needs New capital budget prioritization process implemented for annual budget decisions and ongoing project tracking and financial management Identify and implement cost-effective strategies to hire qualified employees in all sections and train current employees as our bus fleet evolves Updated preventive maintenance procedures for Type 2 and 3 light rail vehicles and fully digitized the process, improving efficiency, reliability, and employee safety
	FY2020 - FY2024 MEASURE / TARGET Annual increase in cost per vehicle hour (bus, MAX, WES, LIFT/CAB) less than or equal to targeted budget amount	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> Implement changes in maintenance practices identified in Continuous Improvement Processes Ensure necessary capital and operating needs are approved and deployed to support new service before implementation Ensure market-competitive labor costs Review structural long-term state of good repair requirements and impact on cost per hour

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¹⁹ All measures for this Objective are 12-month average year-over-year as of February 2019

²⁰ Compared to 2.3% February 2019 year-over-year Consumer Price Index for Urban (CPI-U) Consumers Western US size class B/C cities rate at <https://www.bls.gov/regions/west/data/xg-tables/ro9xg01.htm>

INTERNAL BUSINESS PRACTICES GOAL 1: Deliver Safe, Efficient, and Equitable Service

OBJECTIVE	STATUS	RESULTS
18. Increase resiliency	FY2019  All-Hazards Emergency Management Plan on schedule  Continuity of Operations Plan on schedule	 Produced and distributed guide to home preparedness for all TriMet employees <ul style="list-style-type: none"> ▪ First full All-Hazards Emergency Management Plan complete and expected to be approved by the Oregon Department of Transportation by the time this Plan is published ▪ Continuity of Operations Plan underway and expected to be complete by new target ▪ TriMet Emergency Operations Center (EOC) staff trained in National Incident Management System (NIMS)
	FY2020 - FY2024 Annual update of All-Hazards Emergency Management Plan (includes earthquake preparedness and climate change resilience) completed: before end of FY2020 Continuity of Operations Plan finished and roll-out completed: FY2020	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Update annually and begin implementation of broad-based All-Hazards Emergency Management Plan including <ul style="list-style-type: none"> ○ Earthquake, extreme weather, and climate change ○ Review of standards, design criteria, procurements, redundancy, and projects for long-term resilience ▪ Develop and implement updated vision for Emergency Management Program ▪ Train TriMet staff on Incident Command System based on the training plan ▪ Provide annual training to Emergency Operations Center staff on emergency management roles and activities

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  = off target
  = completed Key Strategic Action

INTERNAL BUSINESS PRACTICES GOAL 2: Design and Deliver Successful Projects

OBJECTIVE	STATUS	RESULTS
19. Develop higher capacity bus services	 Division Transit Project on new, updated schedule	<ul style="list-style-type: none"> ✓ Completed National Environmental Policy Act work for Division Transit Project ✓ Completed 60 percent design for Division Transit Project <ul style="list-style-type: none"> ▪ Federal Transit Administration announced that it has allocated \$87.4 million to help fund the Division Transit Project ▪ Engaged public regarding design and service of Division Transit Project through community events and other methods including building a full-scale working model of a project station for community and stakeholders to test interaction of buses, passengers, bicyclists, and pedestrians ▪ Engaged public regarding construction and expansion of capacity at Powell garage (which will be able to accommodate higher-capacity, articulated buses) including open house, community meetings, one-on-one conversations with nearby community members, and online information ▪ Including options for additional articulated buses as part of Division Transit Project bus procurement
	MEASURE / TARGET Division Transit Project in service: Fall 2022	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ For Division Transit Project: <ul style="list-style-type: none"> ○ Complete Federal Transit Administration Project Development requirements ○ Enter into Grant Agreement with Federal Transit Administration ▪ Implement higher capacity articulated buses on other bus line service, when and where appropriate, during the next five years

FY2019

FY2020 - FY2024

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INTERNAL BUSINESS PRACTICES GOAL 2: Design and Deliver Successful Projects

OBJECTIVE		STATUS	RESULTS
20. Develop partnerships to support faster and more reliable bus service	FY2019	 Four hotspots implemented during FY2019 ²¹ .	<ul style="list-style-type: none"> ▪ Secured funding for transit priority treatments from HB2017 and pursuing additional funding for further treatments ▪ Installed bus transit priority improvements at multiple locations within City of Portland (SE Washington at 82nd; SE Division at 60th Ave; NE Sandy at Killingsworth; and NE 15th at Fremont). ▪ Three bus lanes from Transit Mall to bridges in downtown included in adopted Central City In Motion Plan and scheduled for implementation before end of calendar 2019 to improve bus travel times and reliability ▪ Regional Transportation Plan adopted with a Transit Plan and more transit priority policies
	FY2020 - FY2024	Implement five transit priority spot improvements that decrease transit peak delay by 10% or more	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Implement Enhanced Transit bus improvements. This includes: <ul style="list-style-type: none"> ○ Design improvements ○ Secure funding ▪ Improve transit priority on corridors and/or at hotspots ▪ Increase supportive policies for improving transit travel time and performance with the region, counties, cities, and ODOT ▪ Develop and implement strategy for faster limited-stop bus services including potential use of freeway shoulders ▪ Expand transit priority spot improvement program in City of Portland and expand to other jurisdictions through efforts including pursuit of state grant funding

²¹ As of March 2019



INTERNAL BUSINESS PRACTICES GOAL 2: Design and Deliver Successful Projects

OBJECTIVE	STATUS	RESULTS
21. Meet milestones for successful development of Southwest Corridor	 FY2019 milestones met—completed Draft Environmental Impact Statement (DEIS) and Locally Preferred Alternative (LPA)	<ul style="list-style-type: none"> ✓ Completed Draft Environmental Impact Statement and Locally Preferred Alternative with successful adoption at all involved jurisdictions ▪ Request to Federal Transit Administration to enter Project Development for Southwest Corridor Project approved February 2019 ▪ Engaged public regarding design, environmental benefits, potential impacts of project, and equitable development through community groups and events. Distributed information at transit centers and provided support staff for Metro-hosted open houses and Community Advisory Committee meetings ▪ Executed agreement with partners supporting equitable development in Southwest Corridor
	FY2020 - FY2024 MEASURE / TARGET Enter FTA Project Development: by end of FY2019 FEIS/ROD completed: FY2020	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Complete FTA Project Development during FY2021 ▪ Continue public engagement on project ▪ Ensure full information availability and focus on regional funding measure for November 2020

 = on target
  = caution
  = off target
 ✓ = completed Key Strategic Action

INTERNAL BUSINESS PRACTICES GOAL 2: Design and Deliver Successful Projects

OBJECTIVE	STATUS	RESULTS
22. Improve existing MAX infrastructure for reliability and capacity	FY2019  Planned projects completed	 Completed control and signal improvements at Ruby Junction and Elmonica Yards <ul style="list-style-type: none"> ▪ Completed switch and track improvements in Hillsboro at Hatfield Government Center ▪ Began contracting out for mid-life remanufacturing of older light rail vehicles
	FY2020 - FY2024 Programmed switch, track, control, and systems improvements completed: before end of FY2020	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Implement systems reliability improvement projects in Capital Improvement Plan (signal, overhead catenary system, light rail vehicle improvements) including: <ul style="list-style-type: none"> ○ Selected turnout replacements in Rose Quarter and Lloyd completed in FY2020 ○ Steel Bridge work completed during FY2021 ○ Switch, track, control and systems improvements at Cleveland during FY2020 and FY2021 ▪ Note that Key Strategic Actions also significantly address Objective 37

 = on target	 = caution	 = off target	 = completed Key Strategic Action
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INTERNAL BUSINESS PRACTICES GOAL 3:

Business Practices that Create Value and Spur Innovation and Continuous Improvement

OBJECTIVE	STATUS	RESULTS
23. Maximize benefits and potential of Hop Fastpass®	 Hop Fastpass® continued substantial growth in use	<ul style="list-style-type: none"> ✓ Low-Income Fare implemented with Hop Fastpass® ▪ Conducted broad outreach program and phased out non-Hop fares for single use ▪ Coordinated with ODOT and smaller transit agencies around the region and across Oregon to prepare for potential adoption of Hop Fastpass® in future years ▪ Conducting ticket exchanges for Hop Fastpass®™ to allow customers to switch over ▪ Began accepting Hop Fastpass® on LIFT
FY2019	MEASURE / TARGET	KEY STRATEGIC ACTIONS
FY2020 - FY2024	Increase total monthly year-over-year Hop taps at least 25%: FY2020 ²² Number of additional business partners added annually: target to be developed	<ul style="list-style-type: none"> ▪ Conduct strategic review during FY2020 of additional benefits possible with Hop Fastpass® ▪ Phase out paper fares (excluding LIFT paratransit and Bus Ticket Printer fares) with robust public engagement by end of calendar 2019 ▪ Encourage Oregon transit agencies and other entities to implement Hop Fastpass® and other mobility solutions ▪ Further integrate Hop Fastpass® for uses such as LIFT rides and Bike & Ride secure bike parking facility access ▪ Review opportunities for Hop Fastpass® data for marketing and service planning ▪ Finish implementation of Hop Fastpass® with institutional pass users in FY2020

²² Measure and Target under review and may be updated

 = on target	 = caution	 = off target	 = completed Key Strategic Action
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INTERNAL BUSINESS PRACTICES GOAL 3:

Business Practices that Create Value and Spur Innovation and Continuous Improvement

OBJECTIVE	STATUS	RESULTS
24. Test electric buses in service for performance and cost-effectiveness	 Received first battery electric bus and operated in service	<ul style="list-style-type: none"> ▪ First battery bus in service with more on the way ▪ Construction completed for charging at Merlo bus garage. Dispensers undergoing testing ▪ In-route charging equipment at Sunset completed, commissioned, and in use ▪ Adopted broader fleet strategy in Non-Diesel Bus Plan
	MEASURE / TARGET Procure and operate non-diesel buses on-time based on TriMet Non-Diesel Bus Plan	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Conduct assessment of efficiency, cost, and service reliability of electric buses in service ▪ Purchase additional non-diesel buses during five year period ▪ Ensure bus garages will be compatible with electric charging infrastructure needs

 = on target	 = caution	 = off target	 = completed Key Strategic Action
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INTERNAL BUSINESS PRACTICES GOAL 3:

Business Practices that Create Value and Spur Innovation and Continuous Improvement

OBJECTIVE	STATUS	RESULTS
25. Develop and pursue strategic partnerships to optimize and innovate practices and processes	 Completed Mobility on Demand (MOD) Sandbox technologies project on-time	<ul style="list-style-type: none"> ▪ Completed Mobility on Demand (MOD) Sandbox technologies project on-time and released web-based multi-modal trip planner using the technology (currently available as of April 2019 at betaplanner.trimet.org) ▪ Completed initial strategic analysis of new mobility opportunities including autonomous vehicle technology
	MEASURE / TARGET At least one project implemented and adding value during FY2020	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Implement internal practices in each division that support partnership and innovation ▪ Develop long-term strategic approach for New Mobility opportunities ▪ Develop approaches for integration of technology and policy framework to deploy technologies and use for the following: <ul style="list-style-type: none"> ○ Implement pilot rail operations optimization technology using internet of things technology applications for MAX vehicles ○ Develop autonomous vehicle technology strategy, approaches, and partnership opportunities ○ Transit signal priority and enhanced corridors ○ Develop technology and partnership protocols to provide frictionless information and trip-planning, travel, and integrated payment options for customers ▪ Conduct strategic review of internal business processes in 2020 to 2021 and launch change management and implementation strategy in 2022 ▪ Identify and act on opportunities within supply chain and operating platform for strategic partnerships ▪ Implement pilot project for demand responsive service for seniors and persons with disabilities. Begin work in FY2020 following engagement with riders and public

 = on target
  = caution
  = off target
  = completed Key Strategic Action

INTERNAL BUSINESS PRACTICES GOAL 3:

Business Practices that Create Value and Spur Innovation and Continuous Improvement

OBJECTIVE	STATUS	RESULTS
26. Grow business inclusion and diversity efforts	 Improved ability to encourage and track participation in contracting opportunities	<ul style="list-style-type: none"> ▪ Added staff to work with Disadvantaged Business Enterprise (DBE) contractors and TriMet project definition to increase DBE participation ▪ Tracking of opportunities and success in hiring Disadvantaged Business Enterprises and/or Minority Business Enterprises (DBE/MBE) ▪ Increased diversity of executive team
	FY2020 - FY2024 MEASURE / TARGET Future targets to be developed during FY2020	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Enhance agency-wide efforts on diversity in contracting by extending and expanding upon Engineering & Construction best practice approaches to all contracting efforts ▪ Target and increase recruitment of small, DBE/MBE-certified firms for opportunities to do contract work for TriMet ▪ Build the regional pool of qualified contractors by mapping potentially eligible firms and helping them achieve DBE certification ▪ Work with other regional agencies to identify systemic strategies and approaches to supporting and strengthening the regional DBE/MBE contracting community

 = on target	 = caution	 = off target	 = completed Key Strategic Action
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INTERNAL BUSINESS PRACTICES GOAL 3:

Business Practices that Create Value and Spur Innovation and Continuous Improvement

OBJECTIVE	STATUS	RESULTS
27. Innovatively increase financial resources	 Multiple projects sold or making progress toward development	<ul style="list-style-type: none"> ✓ Sold over \$1.2 million worth of Clean Fuel credits (state of Oregon program developed to reduce greenhouse gas emissions), providing opportunity to generate revenue for transit from reduced carbon emissions due to the transit service we provide ▪ Initial analysis of TriMet-owned land opportunities yielded eight projects with partners: <ul style="list-style-type: none"> ○ Two projects where TriMet has sold land and one in negotiations to sell to a non-profit developer who will construct affordable housing adjacent to transit (see Objective 7). ○ Five projects still in negotiations, three value capture projects with mixed market rate and affordable housing, one academic and potential mixed-use, and the other likely office/commercial. ○ A total of about 900 or more housing units, including over 500 affordable units. ▪ Created new Transit-Oriented Development team which has started a strategic review of development and commercial opportunities
	MEASURE / TARGET	KEY STRATEGIC ACTIONS
	FY2020 - FY2024 Milestones for strategy to leverage current TriMet assets	<ul style="list-style-type: none"> ▪ Advance strategy for leveraging current TriMet assets and intellectual property, such as using existing land, right-of-way, Park & Rides, and other resources ▪ Encourage transit-oriented development that increases off-peak and weekend transit ridership to take advantage of available capacity of existing services ▪ Pursue additional funding sources for TriMet projects ▪ Deliver FY2020 external commercial opportunity scan

 = on target
  = caution
  = off target
  = completed Key Strategic Action

People & Innovation Goals

PEOPLE & INNOVATION GOAL 1: Ensure a Culture of Safety

OBJECTIVE		STATUS	RESULTS
28. Successfully implement the Safety Management System across the organization	FY2019	 Seven safety audits performed to date during FY2019  3.8 lost time injuries rate (per 200,000 hours worked)	<ul style="list-style-type: none"> Bus panels for operator safety will be included in all new bus orders Procuring Learning Management System for safety- and security-related training New peer-based safety and support team working with operators to increase practices that support a culture of safety
		FY2020 - FY2024	MEASURE / TARGET
Six or more safety audits performed annually 5.4 per 200,000 hours or lower lost time injuries rate ²³ : FY2022	<ul style="list-style-type: none"> Implement Safety Management System. Examples include: <ul style="list-style-type: none"> Continue Risk Analyses, including Operational and Job Hazard Analyses, to identify significant safety risks and implement mitigation measures Deliver consistent departmental safety awareness information to existing and new employees Implement and ensure effectiveness of safety risk mitigation measures. Develop and implement continuous improvement plans in operations safety. Deliver additional security technology, infrastructure, and practices Incorporate safety and security recognitions for employees during ROSE Week 2020 		

 = on target
  = caution
  = off target
  = completed Key Strategic Action

²³ This target may need to be updated during FY2020 in keeping with OSHA requirements

PEOPLE & INNOVATION GOAL 2:

TriMet is Where Diverse and Talented People Want to Come, Stay, and Thrive

OBJECTIVE	STATUS	RESULTS
29. Invest wisely in people	<div style="display: flex; flex-direction: column; align-items: center;"> <div style="display: flex; align-items: center; margin-bottom: 5px;"> ↑ 5.0 average score on most recent quarterly engagement survey with one to six rating scale (six is best) </div> <div style="display: flex; align-items: center; margin-bottom: 5px;"> ■ 3.7 percent training and development costs (including tuition reimbursement) as a percentage of payroll </div> <div style="display: flex; align-items: center; margin-bottom: 5px;"> ↓ 26 percent of employees below their predicted compensation (average ratio for those under target is 0.97) </div> <div style="display: flex; align-items: center;"> ■ 5.4 percent turnover percentage – minus retirements from agency (overall) </div> </div>	<ul style="list-style-type: none"> ▪ Expanded internal training resources including management development, bias awareness, communication, financial, and technological skills
	<div style="display: flex; flex-direction: column; align-items: center;"> <div style="margin-bottom: 10px;"> MEASURE / TARGET </div> <div style="margin-bottom: 10px;"> 4.6 or better on engagement survey benchmark²⁴ with one to six rating scale (six is best) </div> <div style="margin-bottom: 10px;"> At least four percent training and development costs as a percentage of payroll </div> <div style="margin-bottom: 10px;"> Zero percent of employees below an acceptable range of their predicted compensation²⁵: FY2023 </div> <div style="margin-bottom: 10px;"> For employees below predicted compensation, 1.0 ratio of actual salary to predicted compensation </div> <div> No more than five percent turnover percentage – minus retirements from agency </div> </div>	<div style="display: flex; flex-direction: column; align-items: center;"> <div style="margin-bottom: 10px;"> KEY STRATEGIC ACTIONS </div> <ul style="list-style-type: none"> ▪ Implement improved Predicted Compensation Model approach ▪ Review and update compensation across divisions to better match market ▪ Continually update market survey of benchmark jobs ▪ Develop Professional and Leadership Development Strategy by end of FY2021 ▪ Implement Learning Management System </div>

²⁴ Benchmark based on other employers in similar industries

²⁵ Based on Objective Compensable Factors and meets Oregon Pay Equity Act requirements

↑ = on target

■ = caution

↓ = off target

✓ = completed Key Strategic Action

PEOPLE & INNOVATION GOAL 2:

TriMet is Where Diverse and Talented People Want to Come, Stay, and Thrive

OBJECTIVE	STATUS	RESULTS
30. Ensure open and honest communication between management and direct-customer-serving employees	 Quantum employee survey results from communication question ("There is open and honest communication between employees and manager") averaged 4.7 (on a 1-6 scale) during FY2019 to date	<ul style="list-style-type: none"> Multiple internal committees with broad representation include Employee Recognition committee and continued commitment to ongoing groups such as Employee Round Tables, Continuous Improvement Teams, ongoing Service Performance and Development Committee, and Service Change Management Committee Internal education and training program includes communication skills, inclusiveness and cultural agility for all, including managers Implemented internal collaboration software for meetings, video and screen sharing across the agency to coordinate across TriMet locations
	MEASURE / TARGET	KEY STRATEGIC ACTIONS
FY2020 - FY2024 Meet or exceed benchmark ²⁶ average of 4.1 (out of six) on communication question ("There is open and honest communication between employees and manager")	<ul style="list-style-type: none"> Develop and implement strategies in each division to strengthen internal communication channels, especially with direct-customer-serving employees, including more face-to-face communication Implement regular meetings between leaders and employees More clearly communicate efforts motivated by results of engagement survey 	

²⁶ Benchmark based on other employers in similar industries

 = on target	 = caution	 = off target	 = completed Key Strategic Action
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PEOPLE & INNOVATION GOAL 2:

TriMet is Where Diverse and Talented People Want to Come, Stay, and Thrive

OBJECTIVE	STATUS	RESULTS
31. Foster sense of community and cross-functional camaraderie	FY2019  Committees formed and cross-functional engagement activities expanded providing more cross-functional communication  521 employees participated in volunteer events ²⁷ (273 community benefit and 248 TriMet internal and service opportunities)	<ul style="list-style-type: none"> Multiple internal committees with broad representation include new scheduling-led employee roundtables, Continuous Improvement Teams, ongoing Service Performance and Development Committee, Service Change Maintenance Committee, and Operations/Engineering & Construction Technical Advisory Group Offered volunteer opportunities to benefit community causes through “Team TriMet” and other opportunities including Pride Parade, and Heart Walk Volunteer efforts to support TriMet colleagues such as Bus Roadeo, holiday dinners, and Recognize Outstanding Service Excellence (ROSE) Week Supplemented rider information during major service disruptions and community events with voluntary Ride Guide and Ask Me duty (not currently included in measure) Executive management increased volunteer activities
	FY2020 - FY2024 MEASURE / TARGET Number of employees participating in external- and colleague-serving volunteer events equal to or higher than previous year	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> Continue to pursue initiatives for cross-functional engagement and connections between TriMet employees in different departments. Use committees with broad representation including direct-customer-serving employees. Look for additional opportunities to create and strengthen cross-divisional work teams, information sessions, and social events Continue offering volunteer activities and include executive management

 = on target
  = caution
  = off target
  = completed Key Strategic Action

²⁷ Calendar year 2018 totals as compared to calendar 2017 totals

PEOPLE & INNOVATION GOAL 2:

TriMet is Where Diverse and Talented People Want to Come, Stay, and Thrive

OBJECTIVE	STATUS			RESULTS
32. Achieve agency Affirmative Action goals FY2019	Actual (FY2018)²⁸	Non-union Jobs	All Jobs	<ul style="list-style-type: none"> Working with community organization to improve ability to place more applicants with disabilities in positions at TriMet Workforce diversity review completed and improvements being implemented Improved internal training for equitable hiring practices with new Hiring Well and Bias Busting classes for all staff involved in hiring
	Minority	↑ 23.3 percent	↑ 26.7 percent	
	Women	↑ 37.5 percent	↓ 25.9 percent	
	Veteran	↓ 4.3 percent	↓ 4.4 percent	
	Persons with Disabilities	↓ 0.6 percent	↓ 0.6 percent	
	↑ TriMet's Executive Team has a utilization for race (non-white) of 27.3 percent, and a utilization rate for gender (female) of 36.4 percent			
FY2020 - FY2024	MEASURE / TARGET			KEY STRATEGIC ACTIONS
	Utilization rates are equal to or exceed weighted average availability rates in TriMet's Affirmative Action Plan ²⁹ for management positions and all TriMet District positions: end of FY2020			<ul style="list-style-type: none"> Use additional methods to recruit diverse candidates, including using search firms that are skilled in recruitment of diverse candidates Implement research- and outreach-based search techniques to identify candidates
	Targets³⁰	Non-union Jobs	All Jobs	
	Minority	16.6 percent	23.3 percent	
	Women	37 percent	29 percent	
	Veteran	6.4 percent	6.4 percent	
Persons with Disabilities	7 percent	7 percent		
Utilization rate for executive positions is equal to or exceeds availability rates in TriMet's Affirmative Action Plan				

 = on target
  = caution
  = off target
  = completed Key Strategic Action

²⁸ Data not yet available for FY2019

²⁹ <http://trimet.org/equity/pdf/affirmative-action-plan.pdf>. Note that targets are periodically updated based on latest availability figures and may not always be current on trimet.org

³⁰ Targets for women and minority utilization goals from the average availability for each group from the "Utilization Analysis and Placement Goal Table" in the Affirmative Action Plan. Utilization targets for veterans and persons with disabilities were taken from Office of Federal Contract Compliance Programs website <http://www.dol.gov/ofccp/>

PEOPLE & INNOVATION GOAL 2:

TriMet is Where Diverse and Talented People Want to Come, Stay, and Thrive

OBJECTIVE	STATUS	RESULTS
33. Recruit a talented workforce	FY2019  91 percent average year to date acceptance to offer ratio  62 days average time to fill positions	<ul style="list-style-type: none"> Acceptance to offer well above target Increased outreach and recruitment efforts for talent and diversity of candidates Added management and hiring classes required for TriMet employees who hire staff Using outside expertise to enhance recruiting efforts and practices
	FY2020 - FY2024 MEASURE / TARGET 75 percent or higher acceptance to offer ratio 60 days or less average time to fill positions	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> Improve time to fill through collaboration between hiring managers and human resources staff

 = on target
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  = off target
  = completed Key Strategic Action

PEOPLE & INNOVATION GOAL 2:

TriMet is Where Diverse and Talented People Want to Come, Stay, and Thrive

OBJECTIVE	STATUS	RESULTS
34. Pursue Professional Growth for Employees	FY2019  48 percent of identified key positions have “ready now” or “ready soon” candidates	<ul style="list-style-type: none"> ▪ Successfully filled multiple key positions in agency due to retirement or turnover. Improving documentation of positions and processes to rely less on institutional memory of individual employees
	FY2020 - FY2024 MEASURE / TARGET 50 percent or more of key positions included in succession plans have candidates identified as “ready now” or “ready soon”: FY2020 ³¹	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Deliver training and provide practical experience opportunities to improve ability of staff to gain promotion within TriMet. Engage employees directly in planning and implementing their own professional development ▪ Recruit with succession in mind especially for vacancies reporting to strategic positions ▪ Improve ability for internal candidates to move into management positions

 = on target	 = caution	 = off target	 = completed Key Strategic Action
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³¹ Measure under review and likely to change for Final Business Plan

PEOPLE & INNOVATION GOAL 3:
Foster Service Excellence and Innovation

OBJECTIVE	STATUS	RESULTS
35. Foster employee innovation, including process improvements	FY2019  Progress made in encouraging innovation especially in operational divisions	<ul style="list-style-type: none"> ▪ Innovation training conducted for a pilot group of employees ▪ All divisions creating or enhancing regular practice of recognizing and encouraging innovation in all areas, including process improvements
	FY2020 - FY2024 MEASURE / TARGET Implementation steps of training, encouragement, and recognition practices	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Continue regular practice of recognizing and encouraging innovation in all areas, including process improvements ▪ Provide external training on fostering innovation to some employees and provide time and venues to share strategies and practices with other employees

 = on target	 = caution	 = off target	 = completed Key Strategic Action
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Financial Goals

FINANCIAL GOAL 1:

Fiscally Sound and Compliant

OBJECTIVE	STATUS	RESULTS
36. Manage financial performance within Strategic Financial Plan guidelines	FY2019  All six Strategic Financial Plan ³² guidelines met  Net medical benefits cost per covered employee <i>decreased</i>	<ul style="list-style-type: none"> ▪ All six Strategic Financial Plan guidelines were met for FY2019 ▪ Redesigned Budget forms and CIP project pages to identify Business Plan objectives addressed, as well as department-level narratives incorporating how it addresses the Business Plan. ▪ Business Plan added resource and capability feedback loop to annual update to improve understanding of need to deliver Key Strategic Actions ▪ Enterprise risk management registry under way. Preparing for mitigation identification and prioritization ▪ AAA bond rating with more stringent criteria reaffirmed by Standard & Poors
	FY2020 - FY2024 MEASURE / TARGET Meet all six Strategic Financial Plan guidelines Net medical benefits cost per covered employee increases at a rate no greater than the Federal Employment Cost Index ³³	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Actively manage and enhance financial performance and decision-making ▪ Refine measurement, analysis, reporting, and management approaches to ensure budget process and strategic planning are fully aligned, including: <ul style="list-style-type: none"> ○ Develop each annual five-year Business Plan, well-coordinated with budget realities and with a fresh review of opportunities and challenges ▪ Achieve active and retiree contributions to premium costs that are consistent with industry peers ▪ Implement an enterprise risk management process during FY2020 including identifying specific mitigation treatments to include in the Business Plan for FY2021

³² www.trimet.org/pdfs/sfp/14-07-37-Strategic-Financial-Plan-WEB.pdf

³³ www.bls.gov/ncs/ect/

 = on target	 = caution	 = off target	 = completed Key Strategic Action
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FINANCIAL GOAL 2:

Manage Assets to Ensure Safety and Optimize Value, Performance, and Resiliency

OBJECTIVE	STATUS	RESULTS
37. Meet or exceed state of good repair targets for all identified asset classes	 Completed Transit Asset Management Plan before deadline	<ul style="list-style-type: none"> ✓ Transit Asset Management Plan completed before federal deadline ▪ TAM Plan inventory and condition assessments on-target for completion for end of FY2019 ▪ FY2019 adopted budget includes increased allocation to state of good repair ▪ State of good repair needs for assets emphasized in annual budget prioritization process
	FY2020 - FY2024 MEASURE / TARGET Zero asset classes below established targets in the short, medium, and long term, as defined in the Transit Asset Management Plan: FY2022	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ During five year period, develop and implement plan to repair, replace or otherwise remedy any asset classes not fully at target ▪ Replace key assets for customer experience and safety ▪ Procure and implement Enterprise Asset Management System – technology improvements for asset inventory, condition assessment, maintenance, and management of TriMet assets

 = on target	 = caution	 = off target	 = completed Key Strategic Action
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FINANCIAL GOAL 3:

Financial Capacity to Advance Regional Expectations for Service Growth and Quality as Represented in the Regional Transportation Plan

OBJECTIVE	STATUS	RESULTS
38. Manage financial capacity to deliver regional expectations for service growth	FY2019  4.7 percent growth in budgeted bus service hours for FY2019	<ul style="list-style-type: none"> Completed TriMet’s Transit Improvement Plan with approval of HB2017 Advisory Committee³⁴ and met state deadlines Expecting Oregon Transportation Commission approval on time before end of FY2019
	FY2020 - FY2024 MEASURE / TARGET 3.1 percent average growth or more in annual percentage of new bus service enhancement, including growth funded by HB2017: FY2020-FY2022	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> Every year, prioritize sufficient operating funds, and additional HB2017 funds to meet the priorities identified for service improvements in each Annual Service Plan

³⁴ <http://trimet.org/meetings/hb2017/index.htm>

 = on target	 = caution	 = off target	 = completed Key Strategic Action
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FINANCIAL GOAL 3:

Financial Capacity to Advance Regional Expectations for Service Growth and Quality as Represented in the Regional Transportation Plan

OBJECTIVE		STATUS	RESULTS
39. Maintain acceptable farebox recovery to optimize the balance of service demands, revenue, and cost	FY2019	 Fixed-route farebox recovery rate at 21.0 percent ³⁵	<ul style="list-style-type: none"> Farebox recovery rate below target as average boardings were slightly reduced, Low-Income Fare was implemented, and cost per vehicle hour grew above inflation due to increased investments in maintenance and operations needs
	FY2020 - FY2024	MEASURE / TARGET 25 percent or greater farebox recovery (passenger revenue/ operations cost) for fixed route	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> In FY2021, after the previous decade with no fare increase, implement incremental increases in fares as called for in adopted fare policy³⁶, approximately \$0.10 every two years During five year period, develop and implement strategies to reduce fare evasion

 = on target	 = caution	 = off target	 = completed Key Strategic Action
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³⁵ Passenger revenue/ system cost 12-month average as of February 2019

³⁶ As adopted in the Strategic Financial Plan guidelines: <http://trimet.org/pdfs/sfp/14-07-37-Strategic-Financial-Plan-WEB.pdf>

The Route Ahead

Each year's Strategic Business Plan is, by necessity, a dynamic document. This is our second annual update, reflecting on performance for the prior year and tailoring our actions in response. We've completed some Key Strategic Actions, adjusted others to better fit changing circumstances, and taken on a few new Actions as well.

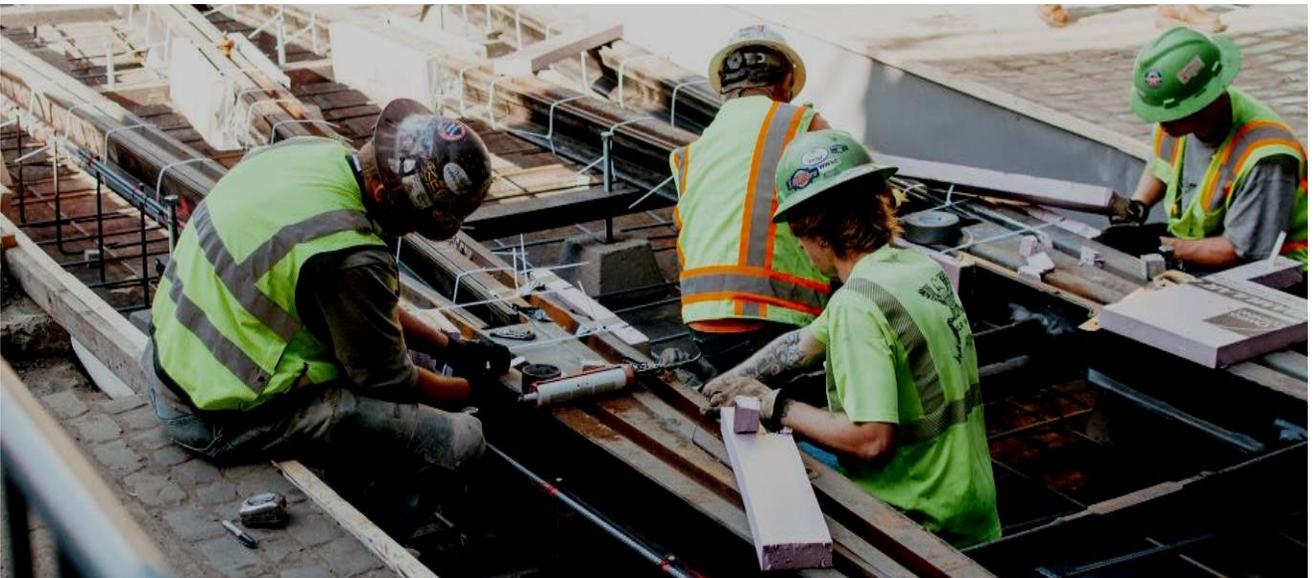
TriMet's management will use the Goals, Objectives, Measures, Targets, and Strategic Actions to set individual targets, define detailed objectives, and focus efforts at the individual, team, and department level with the overall strategic needs. Annual updates will allow us to take on the future with a solid route map while retaining the flexibility to respond when things change.

A few key projects and initiatives are on the immediate horizon and will continue to be developed and expanded in future updates of the Business Plan including:

- Construction of a fourth bus garage to support our expansion of service using HB2017 funding from a State-levied payroll tax
- Division Transit Project
- Expanding our battery electric bus fleet in keeping with the recently adopted Non-Diesel Bus Plan
- Safety Management System and how it fosters our culture of safety
- Upcoming Annual Service Plans
- The challenge of regional growth, congestion, and advances in technology

We believe in a bright future for this region and we are committed to being the leader in delivering safe, convenient, sustainable, and integrated mobility options necessary for our region to be recognized as one of the world's most livable places.





Acronyms and Definitions

Annual Service Plan – Annual plan for bus and rail service enhancements including changes and adjustments from public engagement

AV – Autonomous Vehicle – A vehicle with technology that senses the environment and navigates with reduced or no human input

Business Plan – Overall, agency-level plan that includes Goals, Objectives, Measures, Targets, and Key Strategic Actions at the agency-level

Continuity of Operations Plan – A formal plan for ensuring continuity of operations even in extreme emergencies (e.g., large earthquake)

DBE – Disadvantaged Business Enterprise – Companies with ownership by socially and/or economically disadvantage individual(s)

DTP – Division Transit Project – Capital construction project to provide higher-capacity, more reliable, and faster bus service along SE Division

DEIS – Draft Environmental Impact Statement – A requirement for some large federally funded projects studying potential environmental impacts of those projects

ESMS – Environmental and Sustainability Management System – A systematic approach to improve environmental and sustainability performance

FEIS – Final Environmental Impact Statement – A requirement for some large federally funded projects studying potential environmental impacts of those projects

FFGA – Full Funding Grant Agreement – A contract with the federal government to receive a percentage of funding to construct a transit project

FTA – Federal Transit Administration – The federal agency that provides oversight and funding opportunities for transit agencies

FY – Fiscal Year – The fiscal operating period used by TriMet and other public agencies in Oregon, which runs July 1 through June 30 of the following calendar year; e.g., FY2020 is from July 1, 2019, through June 30, 2020

Goals – Expected achievements during the five years of the Business Plan. Goals are grouped by Success Category. Goals lead to Objectives, Measures, Targets, and Key Strategic Actions

HB2017 – House Bill 2017 – Recently-enacted funding from the State of Oregon for transit that began in FY2019

Hop Fastpass® – Regional transit fare card that works on TriMet, Streetcar, and C-TRAN (with plans for additional services in the future). See www.myhopcard.com

IOT – Internet of Things – Use of sensing technology distributed in many places (e.g., such as in buses, light rail vehicles, or signal infrastructure) to provide more data and information about assets, operations, etc.

Key Strategic Actions – The most impactful or Strategic Actions for agency-level planning and management in the Business Plan. These are specific actions identified to make progress toward Targets, Objectives, and Goals

KPI – Key Performance Indicators – A term not used in this Plan; see Measures and Targets

MBE – Minority Business Enterprise – Companies with ownership by minorities

Measures – Quantitative or qualitative methods of identifying the status in a given issue

MOD – Mobility On Demand Sandbox – A federal grant that TriMet used to improve open source online trip planning and mapping that other transit agencies and transportation providers can also use. The new trip planner integrates transit with other shared-use modes (e.g., ride sharing, ride-hailing, and bike share) and a beta version is currently available as of April 2019 at betaplanner.trimet.org

NEPA – National Environmental Policy Act – The federal statute that requires environmental review of federally-funded projects

NIMS – National Incident Management System – a comprehensive, national approach to incident management that is applicable at all jurisdictional levels and across functional disciplines

Objectives – Specific statements elaborating goals in a way that are actionable and lead to Measures, Targets, and Key Strategic Actions

ODOT – Oregon Department of Transportation – the state agency responsible for transportation

Project Development – Step in the process requirements for large federally-funded transit projects

PUDL - Portland Urban Data Lake – A coordinated collection of data about transportation in the region to be implemented to support TriMet and other regional big data analysis needs and support Smart Cities functions

Pulse Survey – Periodic survey of a small sample of TriMet employees conducted several times a year

Quantum Survey – Periodic survey of TriMet employees conducted every few years

Resilience – The ability of an agency or a service to withstand challenges from external forces like weather and climate change or economic variability

ROOT – Rail Operations Optimization Technology – The name of TriMet's MAX vehicle project that incorporates Internet of Things (IOT) approaches to vehicle and operations management

ROSE – Recognize Outstanding Service Excellence – One week each year to specifically recognize excellent service by all employees

S & P Global – An independent rating company that rates various bonds including public bonds issued by TriMet

SMS - Safety Management System – A comprehensive and coordinated approach to safe operations, maintenance, actions, and management

SEP – Service Enhancement Plan – Long-range shared vision for bus service developed over four years with rider, community, stakeholder, and jurisdictional engagement that illustrates desired future service and serves as a guide to each year's Annual Service Plan priorities

Southwest Corridor – Current planning process for a new, proposed light rail line serving the southwest portion of the region including Tigard, Tualatin, and southwest Portland

SGR - State of Good Repair – A transit industry term that means keeping facilities and vehicles in good repair to maintain safety, efficiency, and operability

Strategic Financial Plan – Adopted TriMet Plan for the long-term financial health of the agency

Strategic Premises – Basic assumptions underlying the projections, analysis, plans, and approaches

Strategic Success Categories – Categories of focus to help organize Goals, Objectives, Measures, Targets, and Key Strategic Actions. They include: Customers, Internal Business Practices; People and Innovation; and Financial

Targets – Specific planned-for performance on Measures. Each Measure has an associated Target to ensure that the Business Plan is focused and leads to a clear indication of whether targets are being met (and therefore demonstrates whether chosen Actions are effective)

Predicted Compensation – A predicted level of pay that an employee would be at, or above, based on the objective compensable factors contained in the Oregon Pay Equity Act

TNCs – Transportation Network Companies – Companies that use technology platforms to connect passengers to rides in personal, non-commercial vehicles; e.g., Uber, Lyft

TAM - Transit Asset Management Plan – A formal, federally-required plan identifying how to manage, for long-term safety and operability, all significant assets owned and maintained by a transit agency; e.g., buses, garages, rail tracks, storage facilities, etc.

