

General Manager Deliverables for FY2024 (July 1, 2023 – June 30, 2024) with Status Updates 7/17/2024

#	Deliverable	Business Plan KSA # reference	Target	Status	Strategic Priority	Responsible Division(s) L=Leader; CL=Co-leader	Vision 2030 Pillar
1	Develop and document initial strategies and actions to achieve Vision 2030	2024-01B-03	Incorporated into Business Plan FY2024. GM will set and lead strategic direction as evidenced in the Business Plan, Budget, Capital Improvement Program, and Service Plan toward execution of Vision 2030.	Complete. Vision 2030 fully incorporated into Business Plan, Budget, and CIP. Board adopted Budget.	All	All Sam Desue Jr. (L) Exec Team (CL)	Ridership
2	Put into service first two years of multi-year Forward Together implementation	2024-01B-05	Planned FY2024 increases in service before end of June 2024 and further increases adopted by Board before end of FY2024 with staffing in place sufficient for implementation including: • Hire at least 200 Bus Operators by end of FY2024	Complete. • Service increases: Complete. Service added during FY2024. Service Ordinance for FY2025 approved. • Hiring: Complete. Over 390 Bus Operators hired.	Ridership; Inclusion, Equity, Diversity, and Access	COO Bonnie (L) Kim (CL)	Ridership
3	Hire and train additional employees and contracted personnel to provide more presence on the system	2024-01A-02	Meet 80% or better of FY2024 Safety and Security employee staffing targets (i.e., 280 or more of 351 positions) consistent with available resources	Complete. Achieved over 350 positions.	Ridership; Safety; Inclusion, Equity, Diversity, and Access	Safety & Security Andrew (L)	People
4	Engage riders, stakeholders, and community for Budget, Business Plan, service changes, Equity and Title VI update, low income fare, fare policy, A Better Red Light Rail Project, Interstate Bridge Replacement Project, potential projects on 82nd Ave and TV Hwy, and other initiatives and projects in development or underway such as transit-oriented development and potential future bus rapid transit projects.	2024-02B-04	Achieve: • At least one public engagement event in each district; • Engage with six or more community partners / organizations • Engage with six or more business organizations • At least 7,000 new low-income fare sign ups • Conduct three community focus groups regarding Vision 2030	Complete. • Event in each district: Complete. • Partners/organizations: Complete. • Business organization: Complete. • Low-income fare: Complete. Over 10,000 signed up for low-income fare. • Community focus groups: Complete.	Community and Partnerships; Inclusion, Equity, Diversity, and Access; Safety	Public Affairs; Engineering & Construction; COO; Inclusion, Diversity, Equity, and Access JC (L) John G (CL)	Community
5	Successfully manage delivery of FTA-grant-funded A Better Red Line MAX Project	2024-05C-04	Substantial completion achieved before end of FY2024 and on-schedule for opening in FY2025	In progress and on track. • Substantial completion: Complete. • On schedule for opening in FY2025.	Ridership	Engineering & Construction Sean (L)	Infrastructure

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6	Continue contractor participation strategies to enhance contracting opportunities and increase participation by certified firms	2024-06A-01	Conduct at least two events for DBEs to educate, inform, and remove barriers to increasing DBE participation	Complete. Over 100 contractors total participated in events.	Inclusion, Diversity, Equity, and Access	Inclusion, Diversity, Equity, and Access; Finance John G (L) Nancy (CL)	Community
7	Recognize and celebrate employees	2024-08C-03	Deliver at least four agency-wide events, such as local Rodeo, Operator Choice Awards, ROSE week, and Family Fun Day	Complete. Local Rodeo, Family Fun Day, ROSE Week, Transit Driver Appreciation Day.	Employees and Employee Experience	HR and all, especially Transportation and Maintenance Kim (L) Inessa (CL) Shelley (CL)	People
8	Manage and align financial performance and decision-making with the Strategic Financial Plan	2024-10A-01	Meet each of the Strategic Financial Plan elements including: <ul style="list-style-type: none"> • Fiscal Policy • Unrestricted Fund Balance & Contingency Policy • Debt Management Policy • Fare Policy • Capital Improvement Plan • Pension Funding Plans In addition: <ul style="list-style-type: none"> • Obtain an unmodified opinion on the annual financial statements. • Adopt a balanced budget by June 30, 2024. • Further develop the 5-year CIP. • Further develop Resources and Community pillars of Vision 2030 to provide clarity around opportunities for funding needed to reach goals. 	Complete. Elements met and Board adopted Budget.	Financial Stewardship and Capacity	Finance Nancy (L)	Resources
9	Receive and commission 24 battery electric buses and deploy for service on equity lines	2024-02A-03	After buses are delivered by the manufacturer, complete 90% of planned steps for commissioning of those BEBs received by end of FY2024	Complete. All 24 BEBs received by June 30 and BEB commissioning on schedule.	Community and Partnerships, Ridership	Maintenance; COO Bonnie (L) John W (CL)	Infrastructure

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10	Deliver budget-approved state of good repair projects on-time and on-budget	2024-05C-05	Execute the following projects on-time and on-budget: <ul style="list-style-type: none"> • rail tie replacement; • vehicle equipment replacements; • Sunset TC elevator hoist way; • Washington Park emergency communications systems replacement; • Server and Desktop replacements; • Farebox and Ticket Vending Machine replacements. • Start construction at 148th MAX station rehabilitation. 	<p>In progress or complete, except one. Details:</p> <ul style="list-style-type: none"> • Rail ties: Complete. • Vehicle equipment replacement: Complete. • Sunset TC: In progress and on track having reached 100% design. • Wash Park: In progress and on track having reached 90% design by end of FY24. • Server and Desktop: In progress and on track. • Farebox and TVM: In progress and on track for 2-year project. <p>• 148th MAX station: Project not funded in FY2024 and deferred for a future year. Made strategic decision to prioritize higher-ridership stations.</p>	Financial Stewardship and Capacity; Safety	Maintenance; Engineering & Construction Sean (L) John W (CL) Andrew (CL) Ethan (CL) Nancy (CL)	Infrastructure
11	Engage with ATU and other stakeholders to develop initiatives to cover in negotiations for new Working and Wage Agreement	2024-08A-01	Complete all necessary stakeholder meetings and develop list of proposals by end of FY2024. Engage with internal stakeholders to develop and analyze proposals for contract negotiations. Meet at least six times with key stakeholders, including operations and maintenance departments. Meet with ATU representatives no less than six times to prepare for formal contract negotiations.	Complete. Have conducted at least 10 formal bargaining sessions plus regular meetings with ATU.	Employees and Employee Experience	LR/HR Kim (L)	People
12	Commission and begin service with Type 6 light rail vehicles as they are delivered by the manufacturer; replace and retire Type 1 light rail vehicles as Type 6 vehicles go into service and are operating reliably	2024-11A-01	At least 10 light rail vehicles received from manufacturer and made ready for revenue service (assuming manufacturer meets delivery schedule) by end of FY2024.	<p>In progress, on revised schedule. 19 LRVs on property.</p> <p>Manufacturer did not meet expected testing schedule.</p>	Ridership; Financial Stewardship and Capacity	Engineering and Construction; Maintenance; Safety & Security Sean (L) John W (CL)	Infrastructure
13	Diversity, Equity, Inclusion, and Accessibility (DEIA) Plan	Supports multiple Goals	Complete DEIA Plan and begin implementation during FY2024	Completed and delivered with implementation on focus areas such as Employee Resource Groups underway.	Inclusion, Equity, Diversity, and Access	Inclusion, Equity, Diversity, and Access John G (L)	People / Community

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14	Deliver workforce development programs in educational pipeline to maintenance positions, internships, entry-level positions, and succession planning for executive and director positions	Goal 8 TriMet is where diverse and talented people want to come, stay, and thrive	<p>Milestones completed before the end of FY2024:</p> <ol style="list-style-type: none"> 1. At least one partnership in place with community colleges, trade schools and/or high schools with pathway to positions in the maintenance department 2. Develop and implement Summer 2024 internship program 3. Identification and recruiting in place for entry-level positions with ladders to potential promotion 4. Implement succession planning program for executive and begin Phase 2 process for key director positions 	<p>In progress and on track or complete.</p> <ul style="list-style-type: none"> • Community Colleges: Complete. Partnership in place with PCC for diesel technology. • Internship: Development Complete and implementation underway. • Entry-level and ladders: Complete. • Succession planning: In progress and on track. 	Employees and Employee Experience; Inclusion, Equity, Diversity, and Access	HR; Maintenance Kim (L) Dan B (CL)	People
15	Maintain Positive Board Relations	Supports multiple Goals	<ul style="list-style-type: none"> • Schedule monthly meetings with Board President, quarterly meetings with all other board members • Hold at least one Board meeting and reception in each of the three counties of the TriMet District • Execute at least one Board Strategy Session around Vision 2030 • Execute at least one Board Retreat around current Agency issues • Execute at least three Board Education sessions on current Agency issues • Provide at least one site inspection of facilities and/or construction projects • Provide weekly updates to the Board on current issues 	<p>Complete.</p> <ul style="list-style-type: none"> • Meetings: Complete. • Board meetings: Complete. • Strategy Session: Complete. • Retreat: Complete. • Board Education Sessions: Complete. Ethics, IDEA, and Strategic Financial Plan. • Site inspections: Complete. • Weekly updates: Complete. 	All	GM Shelley (L) Sam (CL)	People