

**FY 23 Performance Evaluation
July 1, 2022, to June 30, 2023**

**Sam Desue, Jr.
General Manager**

OVERVIEW:

The Annual Performance Review is to document the TriMet Board of Directors' understanding and evaluation of the General Manager's performance between July 1, 2022, through June 30, 2023. This year's objectives for the General Manager focus on fundamental and foundational needs to set TriMet on the right path for future success. Ridership recovery and growth, customer experience, staffing challenges, and long-term financial stability require focused effort now. By strengthening TriMet's fundamental infrastructure and services, the General Manager will prepare TriMet for future growth and improvements to support our region. The deliverables reflect the major objectives important to the Board.

SUMMARY:

Sam Desue has met the Board's objectives as General Manager for the business objectives and deliverables contained in the FY23 Work Plan. The accomplishments this past year reflect the General Manager's leadership and are also a tribute to the dedication and commitment of the staff. The following sections will review the accomplishments realized.

ACCOMPLISHMENTS:

1. Ridership

The objectives focused on were related to encouraging an increase in ridership. First, to implement ridership recovery strategies and coordinate collaboration across divisions to attract previous and new riders, including new arrivals to the region. As of this report, ridership has grown steadily since last year and has recovered to 70% of pre-pandemic levels outperforming other cities in their recovery.

Second, to eliminate the risks to levels of service created by the operator shortages following the 'great resignation' that occurred during the pandemic. This was critical to begin to restore service that had been reduced when there weren't sufficient operators to staff all the routes. This goal was successfully completed through the implementation of a hiring bonus and increasing the training programs for new operators resulting in the hiring of 291 Operators.

Next, to successfully manage delivery of the Division Transit Project, the agencies first Bus Rapid Transit (BRT) service for the agency. As with many prior major projects this one was completed on budget and on time with a popular opening celebration and ongoing operation. The successful completion of this project has created greater interest in more BRT projects in the future and the planning of future BRT is already in the works.

Finally, efforts to improve access to transit by using the updated service analysis and Pedestrian Plan as a start, completing a planning processes to analyze current state of accessible bus stops, identifying key service improvements, enhancing maintenance procedures, and laying the groundwork for jurisdictional partnerships focused on bus stop/MAX station accessibility.

2. Safety

Rider and employee safety is the highest priority. Using the structure developed as part of reimagining security efforts, increase hiring, training, and deployment of customer safety supervisor and safety response team members to provide presence on the system. This goal was accomplished by adding 35 total supervisors on staff (94% of the planned increase) and 46 Safety Response Team members on staff (100% of the planned increase).

To address safety related to employees and the employee experience, a safety management system (SMS) began a multiyear implementation on change management efforts toward cultural adoption of SMS to increase ownership of safety across all departments and employees was launched. The goal for year one was successfully completed, paving the way for increased safety response capabilities throughout the system. Excellence in addressing safety was underscored by the recognition received by APTA for Trimet's innovative approach.

Another instrument of safety completed this year was to develop and implement a cybersecurity roadmap which defines a baseline and delivers new capabilities to ensure greater security of data and data systems.

3. Financial Stewardship and Capacity

Performance in this goal began with a comprehensive evaluation of current state of maintenance at TriMet to determine program efficacy, needs, and opportunities. With a focus on best practices, regulatory compliance, on-time performance, and vehicle tracking, Sam successfully developed a financial roadmap that established priorities across various maintenance needs.

The second action completed successfully involves the alignment of financial performance and decision making with the Strategic Financial Plan. In this effort, Sam successfully developed a fiscally sustainable 5-yr capital Improvement Plan approved by internal management.

Finally, Sam's leadership in the successful adoption of an updated fare policy ensured greater financial stability for the agency and preserved the financial stewardship ethos which has maintained the agency's favorable credit rating and preserved our competitiveness for federal grant funding.

4. Inclusion, Diversity, Equity, and Access (IDEA)

Under Sam's direction, TriMet has applied an Equity Lens Framework in support of TriMet projects and programs. An equity lens was used for contracting policy to advance equity in TriMet contracting and increase the utilization of Certified Firms through TriMet's supply chain. This goal was successfully completed.

Beyond contracting, the organization has shifted its structure under Sam's direction to include a new office centered on IDEA who works across all sectors of the agency to ensure the Framework is applied in various aspects of the agency's functions including human resources, community relations, communications, and rider experience.

5. Employees and Employee Experience

To improve labor management working relationships with the ATU and other stakeholders, initiatives were developed to cover negotiations for new Work and Wage Agreements. This goal was successfully completed with a New Work and Wage Agreement completed that runs through late calendar year 2024.

6. Community and Partnerships

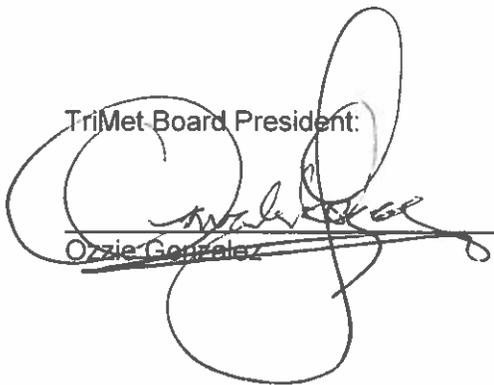
Performance in this category was accomplished through the planning for and creation of more opportunities for the GM and public affairs staff to collaborate with local, regional, and state agencies, businesses within our region, utility providers, and community leaders.

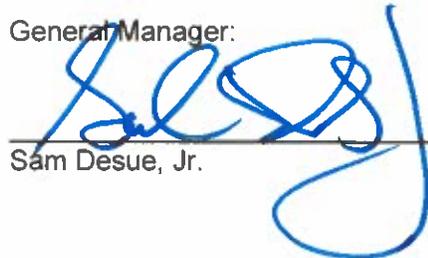
One example of such collaboration occurred with PGE, where a joint effort enabled the successful completion of the first phase of zero-emission bus chargers at Powell garage. This initial work was completed successfully leaving appetite for future phases of development with PGE as well as provided a promising precedent for collaboration with other jurisdictional partners in other areas of Trimet's operations.

7. RECOMMENDED COMPENSATION AND CONTRACT CHANGES:

In October 2022, the Board President recommended TriMet retain an outside firm to conduct a market study for General Manager compensation to ensure TriMet had current market compensation information. Market studies provide TriMet with the necessary information to align its salaries with comparable employers, in which we compete for talent. The Board will be hearing the results of that Market Study at its September 2023 Board Meeting, and be considering a resolution that adopts the Market Study recommendations.

The General Manager has successfully completed two of the three years of his initial contract. In recognition of his leadership, at the September 2023 Board meeting the Board will be considering authorizing the Board President to negotiate a new employment contract with the General Manager.

TriMet Board President:

Ozzie Gonzalez
9/27/23
Date

General Manager:

Sam Desue, Jr.
9-27-23
Date

Attachments:
General Manager's Objectives for Fiscal Year 2023 (Work Plan)