



BUSINESS PLAN

FY2021 – FY2025

DRAFT
January 2020

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 vehicles** 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 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 multimodal 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 the **next generation multimodal trip planner** integrating bikesharing, ridesharing and e-scooters with transit, biking and walking delivering a complete open trip planning platform
In what is believed to be a United States transit industry first, all-electric buses introduced on Line 62 will be **powered by 100 percent wind energy**
TriMet **commits to multiple efforts to reduce carbon footprint**

Letter from the General Manager



TriMet's business is critical public service to this region. We provide transit services and other mobility choices to help you move around our rapidly growing region. This Business Plan presents how we serve our riders, our stakeholders and taxpayers, and our broader community. All of these wonderful people are our valued customers. We strive to provide great service while ensuring we are fiscally responsible. We are always in pursuit of a great customer experience while at the same time we ensure cost-effectiveness to provide and sustain critical service.

We update the strategic Business Plan annually. This Business Plan is for FY2021 through FY2025. In the Plan, we track specific Measures and Targets, report our performance, and learn how to improve using Key Strategic Actions. This year, we've added an update on our Objectives and a focused discussion on our Mobility Management efforts (see Page 8). We also marked which Key Strategic Actions most directly address our Strategic Priorities and Points of Emphasis for FY2021.

As we manage the largest growth in our agency's history and modernize our internal practices and service, including the greening of our fleet, I am so proud of our team of dedicated professionals supporting and leading our operations who work together to make our service even more customer friendly and reliable. We have continued to improve on-time performance and reduce travel times 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 drives in our region understands. So, we're also working with cities and counties to deliver improvements at intersections, smarter traffic signals, and other ways to make buses more reliable and faster.

Thanks to the State of Oregon, House Bill 2017 (HB2017) now provides more funding for transit. This funding pays for the Low-Income Fare program for eligible adult riders. In addition, we are adding services and investments in areas with many low-income households. For the next three years, we plan to introduce more HB2017-funded service each year, especially on bus routes with high ridership potential.

TriMet turned 50 this year! We still embrace the need to stay current, by expanding our benefits to the region. Now, at www.trimet.org, you can plan a trip to and from anywhere in the TriMet district and see options for buses and trains, and for using a Park & Ride, biking, walking, e-scooter, Uber, or Biketown. You can then link to those services online or on your smart device so you can book and pay for the ride too. Give it a try! We continue to deliver new products that will enhance your travelling experience. We realize our customers have travel choices and we need to earn the right, every day, to ensure we are on top of that list.

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

Doug Kelsey
General Manager

Let's move. Let's progress. And let's connect—people, places and opportunity. Let's lift each other up and help each other out. Let's navigate the here and now as we all **move** toward then and there. Because where we're going isn't just found on a map. It's found in a common vision. One driven by an uncommon passion for helping our community and each other. So let's go all in. For our team. For our riders. For this incredible place we call home. For a future that's brighter, cleaner, and better for everyone. Let's remember that life is a road we travel **together**. And that it's a road to great things.

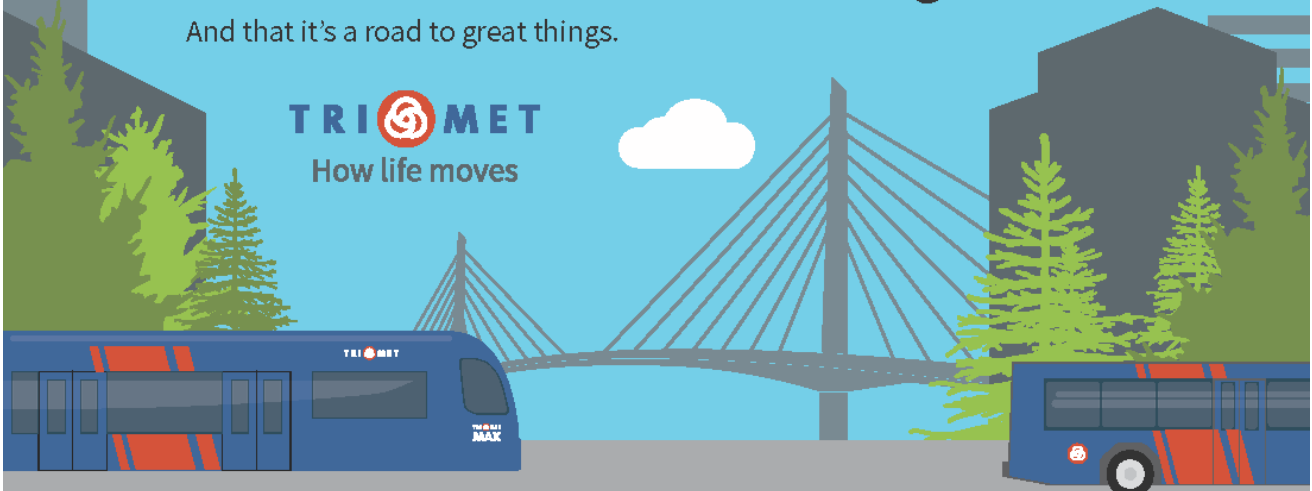


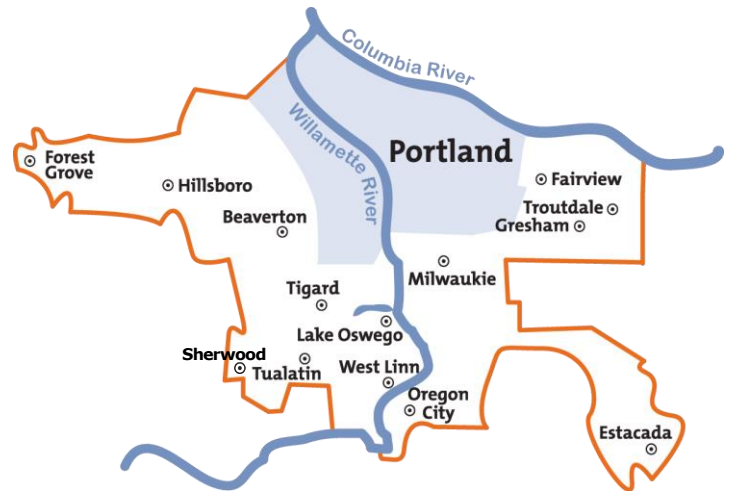
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About TriMet

About Us

- **Transit district created by Oregon law** serving over 1.6 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



Mobility Information for Travelers

- **Next generation multimodal trip planner** integrating rail, bus, bike, walking, bike sharing, scooter sharing, ridesharing and combined options: available now at www.trimet.org
- **Rider Support:** 503-238-RIDE(7433) call or text; 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)

TriMet's Primary Roles in the Region

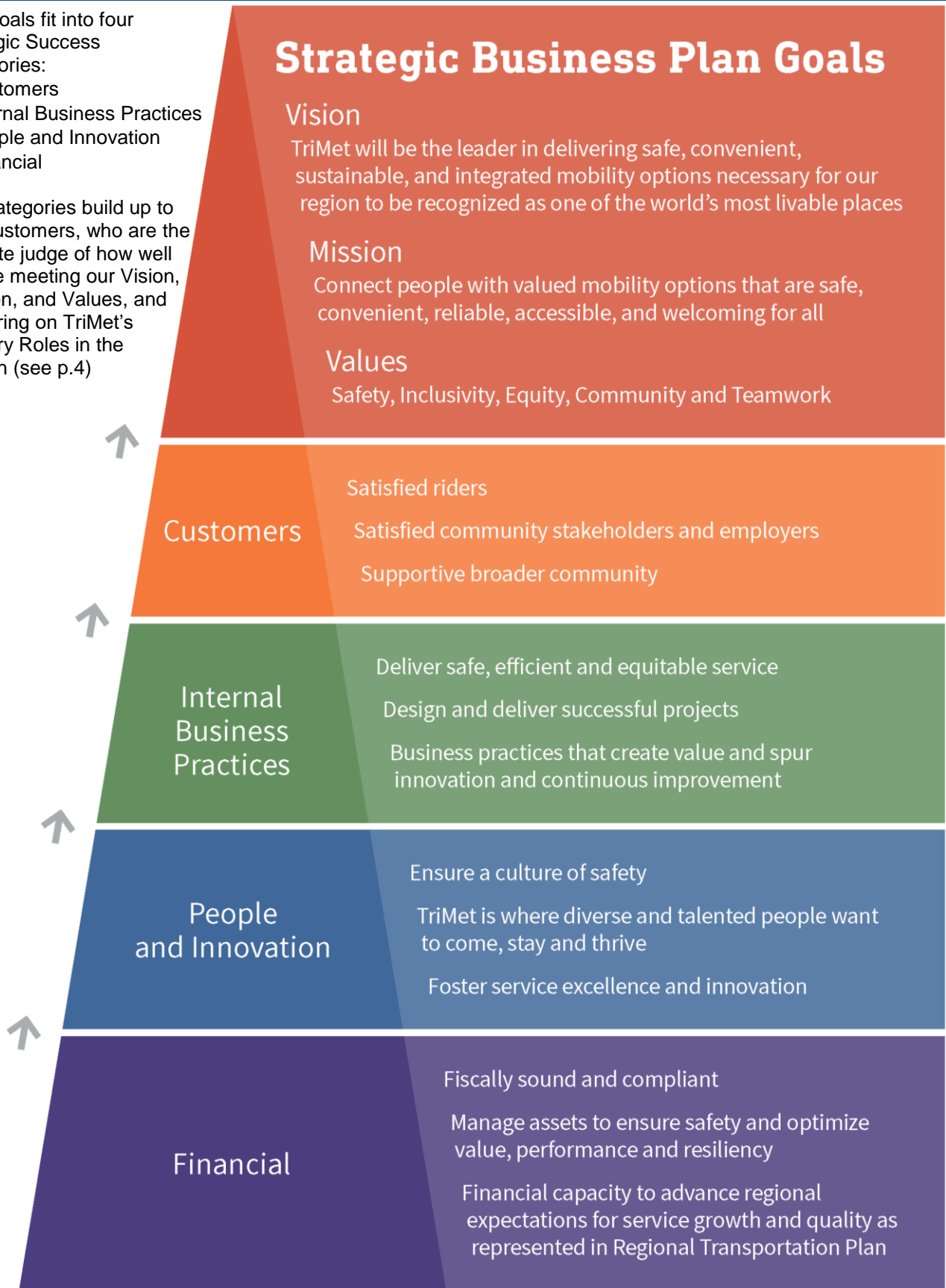
Providing service and projects that:

- **Support our economy and provide opportunity:** Get employees to work, students to school, and customers to businesses with integrated mobility options
- **Ease congestion:** Attract many riders to transit and encourage travel modes other than driving by providing integrated mobility, coordinated information and the kinds of service and capital projects that lead to development and lifestyles that rely less on driving, especially during rush hours
- **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 limited mobility options by getting them to work, school and other destinations on transit or with other accessible mobility options
- **Help shape the future of our region:** Deliver service, mobility options, and capital projects that attract residents, businesses, and development to centers, main streets, and corridors which 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

Our Goals fit into four strategic Success Categories:

- Customers
- Internal Business Practices
- People and Innovation
- Financial

The categories build up to our Customers, who are the ultimate judge of how well we are meeting our Vision, Mission, and Values, and delivering on TriMet's Primary Roles in the Region (see p.4)



Strategic Priorities & Points of Emphasis

This Business Plan covers Fiscal Years FY2021 through FY2025 and will be updated annually with a rolling five-year horizon. The following Strategic Priorities and Points of Emphasis guide the Business Plan and the annual budget process.

Strategic Priorities

TriMet will always:

- continue to build a **culture of safety** to improve system safety and security
- incorporate **equity** in our decision-making and activities

For the next decade and more, TriMet will strategically work toward the following priorities (for roughly a 5-15 year horizon).

Customers	
Enhance ridership and increase non-single-occupancy-vehicle trips	Pursue customer information, service, projects, measures of success, and regulations that increase use of transit and decrease single-occupancy vehicle driving
Enhance Customer Experience	<ul style="list-style-type: none"> • Become a connector and integrator of transportation choices • Significantly reduce customer travel times on key lines • Increase cleanliness on vehicles and across the system
Enhance access to transit	Use short- and long-term tools, including transit-oriented development
Internal Business Practices	
System Safety and Security	Improve presence on the system and tools, techniques, and infrastructure that enhance system safety and security
Optimize internal processes and systems	Pursue improved or new processes and systems to cost-effectively increase effectiveness
People & Innovation	
Training Strategy	Develop and implement long-term operating, safety, and maintenance training needs, approaches, and implementation steps
Financial	
Maintain our current system	Improve the state of good repair for TriMet assets to maintain our current system in good condition for our customers
Increase available funding for service and projects	Enhance available resources for service and projects by improving farebox recovery and increase use, return, and value capture on TriMet assets
Manage funding and fleet to increase ridership	Manage fleet and network expansion to increase mid-term to long-term ridership by: <ul style="list-style-type: none"> • Increasing and/or expanding bus service • Delivering regional projects, such as Southwest Corridor Light Rail, Division Transit Project, Red Line Extension and Reliability Improvements Project, and reliability investments

Points of Emphasis for FY2021

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 FY2021 are:

Customers	
Enhance Mobility and Connections to Transit	<ul style="list-style-type: none"> Pursue new mobility opportunities and partnering to enhance mobility and connections to transit Increase service and frequency
Measure Success Beyond Ridership	<ul style="list-style-type: none"> Develop new measures and targets that better measure success beyond ridership on board TriMet transit vehicles Develop estimate of carbon footprint and track progress in reducing carbon emissions
Presence on the System	Provide enhanced safety and security presence on the system, especially fare enforcement
Internal Business Practices	
Expand Transit Priority	<ul style="list-style-type: none"> Secure additional bus lane and intersection treatments Champion policies that give transit priority over single-occupancy vehicles at cities, counties, Metro and Oregon Department of Transportation
Implement IT Strategic Plan	Develop and begin implementation of the strategic Information Technology plan to make our systems more reliable, our data more useful and our work more effective and efficient
Deliver Capital Program	Deliver TriMet's capital program along with design and funding steps for key regional projects: Southwest Corridor, Red Line Extension and Reliability Improvements Project, and Division Transit Project
People & Innovation	
Enhance Employee Diversity	Continue to implement recommendations from employment diversity report
Develop Training Strategy	Develop operating, safety, and maintenance training strategy
Financial	
Deliver HB2017-Payroll-Tax-Funded Services and Benefits	Continue to increase enrollment in the Low-Income Fare program and increase service and frequency

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 and the broader community. We will continue to engage the diverse communities we serve as we implement and update this Business Plan, because they are the ultimate reason we strive for success.



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
- Employees who are the face of TriMet and provide customer service every single day
- 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
- 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 fixed-route bus fleet
- Good Hop Fastpass® adoption rate and introduction of virtual pay
- Low-Income Fare rapidly gaining customers
- High level of pension funding

Weaknesses

- Have not yet fully achieved a consistent culture of safety
- Many competing needs for capital and operating resources
- Workload, expectations, and staff capacity not consistently well-matched
- Physical separation of administration employees and operations employees hinders communication and teamwork
- Working and Wage Agreement limits flexibility
- 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 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

Opportunities

- Strong public and jurisdictional support for existing and expanded public transit
- Enhanced public input with new tools and approaches for better understanding of customer needs
- Increased payroll tax funding
- New technologies available for data analysis, information, and communication
- External partnerships, including transit agency peers and jurisdictions with transportation regulatory authority
- Advance opportunities to collaborate with Union leadership
- 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 (TNCs) and other travel options may help solve “first- and last-mile” challenges
- Autonomous vehicle technology and potential for safety and efficiency 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 riders who actively choose to ride TriMet over their other options
- Further expand diversity of TriMet staff and contractors
- Light rail fleet replacement and remanufacturing
- Advances in clean fuel technology

Challenges

- Competing regional demands and priorities
- Reducing carbon footprint
- Enhanced safety of employees who provide direct service to customers
- Congestion and impact on 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)
- 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
- Disruption to riders by persons with an emotional or mental disability
- Changing political and regulatory environment
- Portions of service area lacking sidewalks or with inaccessible crossings and sidewalks
- Resiliency to significant but rare events such as 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 ridehailing companies and other mobility options could be destabilizing
- Waning public trust in government and large institutions
- Quick and timely delivery of service and facilities
- 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 timing and reliability

Premises

Agency

- TriMet vision, mission, and values for mobility integration continue to guide TriMet
- TriMet will strengthen its culture of safety

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 will continue to use state funding provided by HB2017 to provide for the Low-Income Fare program, expand service (especially to low-income communities), purchase battery electric buses, assist in building needed facilities to support growth, and facilitate Community/Job Connectors
- 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

Sustainability

- Increasingly urgent need to reduce carbon emissions

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 be testing articulated buses for other lines
- TriMet continues under Non-Diesel Bus Plan¹ toward electrification of the bus 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>

Update on Objectives and Mobility Management

Update: Progress on Objectives

This year, TriMet has **completed** an Objective from the previous Business Plan. We are also adjusting several others to recognize our progress and take advantage of lessons learned and evolving conditions.



Achieve market acceptance of Hop Fastpass® as a fare instrument [**OBJECTIVE COMPLETE**]

Hop Fastpass® now accounts for over 75 percent of fares collected on TriMet! We are ahead of schedule because the original Target was to reach 75 percent by FY2022. By the end of FY2020, all institutional pass users will be fully integrated with the Hop Fastpass® system, the Low-Income Fare is fully integrated, and most other fare instruments (like paper passes) have been phased out. This Objective is **complete**. TriMet will continue to look for ways to use Hop Fastpass® to improve our customers' experience, and that effort is captured in Objective 21: Maximize benefits and potential of Hop Fastpass®.

Objective 11. Improve environmental sustainability and stewardship [wording and number change]

This change better recognizes TriMet's commitment to sustainability, including the development of a "carbon lens" for procurement and other key decision-making.

Objective 22. Reduce TriMet's Carbon Footprint [wording and number change]

The old wording called for testing electric buses, but we are no longer simply testing them. TriMet has made a commitment to shifting our entire bus fleet to non-diesel energy by 2040 or before and is currently pursuing purchase of new electric buses and conversion of mid-life buses to electric. These, plus other efforts like using wind power to operate MAX light rail, are aimed toward reducing TriMet's carbon footprint to do our part in addressing climate change.

Objective 32. Foster employee innovation, including process improvements and partnerships [combines the previous Objective to "Develop and pursue strategic partnerships to optimize and innovate practices and processes" and the Objective to "Foster employee innovation, including process"]

Innovation continues to be essential to TriMet's long-term success.

Objective 36. Maintain acceptable farebox recovery to optimize the balance of service demands, revenue, and cost now also incorporates last year's Objective "Ensure cost-effective service" [combined to reduce repetition of efforts]

Both Objectives addressed cost-effectiveness. Measures and Actions have been combined.

Mobility Management

TriMet's mission is to connect people with valued mobility options that are safe, convenient, reliable, accessible, and welcoming for all. The core of that effort is to provide safe, seamless, and attractive bus, rail, and paratransit service. However, the options for mobility have expanded greatly in this decade. TriMet's primary roles in the region can be enhanced by making connections between transit and other modes as frictionless as possible. "**Mobility management**" is about enabling the complete trip, which may or may not include transit, but which enables people to get around where they need to without being forced to use a car.

One important part of mobility management is providing high-quality information about integrated mobility options. TriMet's integrated mobility trip planner does exactly that. At trimet.org, anyone can plan a trip between any two points in the region with transit, walking, bicycling, Park & Ride, Uber, e-scooter, or bikeshare. In the future, we aim to add even more options.

But mobility management is about more than customer information and an easy-to-use trip planning interface that works on any mobile device. In order to improve mobility in the region substantially, we must do more. This includes taking care of what we have now; making improvements and increasing service; expanding access to mobility options; building projects; and providing seamless mobility options. TriMet will keep working hard to make services more convenient for current and future customers, more sustainable, and to help people navigate all the mobility options available to best fit their needs.



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 of Objectives, 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 performance or status of a given Objective or 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 test whether chosen actions are effective).
- Key Strategic Actions – Specific actions identified to make progress toward Targets that can be clearly assigned and managed.

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 and actions of all TriMet departments so that our efforts are aligned at each level.

Simple icons next to each Measure show our status and each Objective table has a description of results.

A list of acronyms and definitions for terms used is included at the end of this Plan.



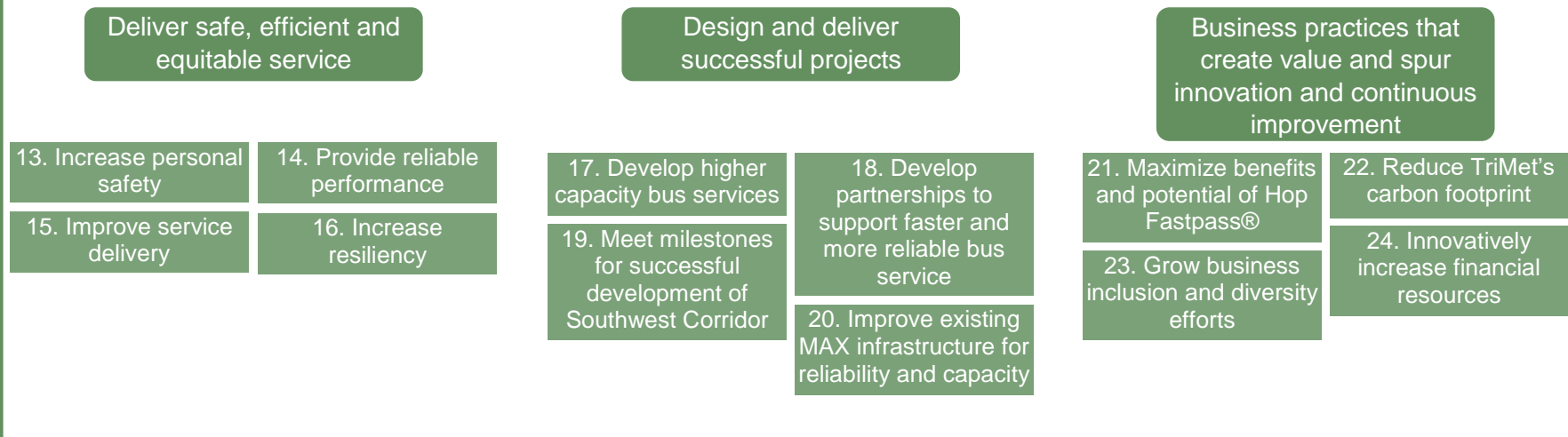
Goals and Objectives Overview

Each of the 12 Goals has one or more Objectives which help define our intentions and lead to Key Strategic Actions. The Goals and Objectives for FY2021 are summarized here. The following pages present far more detail, including specific Measures, Targets, and Key Strategic Actions for each Objective.

Customers



Internal Business Practices



People and Innovation

Ensure a culture of safety

25. Successfully implement the Safety Management System (SMS) across the organization

TriMet is where diverse and talented people want to come, stay, and thrive

26. Invest wisely in people
28. Foster sense of community and cross-functional camaraderie
30. Recruit a talented workforce

27. Ensure open and honest communication between management and direct-customer-serving employees
29. Achieve agency Affirmative Action goals
31. Pursue Professional Growth for Employees

Foster service excellence and innovation

32. Foster employee innovation, including process improvements and partnerships

Financial

Fiscally sound and compliant

33. Manage financial performance within Strategic Financial Plan guidelines

Manage assets to ensure safety and optimize value, performance, and resiliency

34. Meet or exceed state of good repair targets for all identified asset classes


Financial capacity to advance regional expectations for service growth and quality as represented in Regional Transportation Plan

35. Manage financial capacity to deliver regional expectations for service growth
36. Maintain acceptable farebox recovery to optimize the balance of service demands, revenue, and cost


Customers


Everyone in the TriMet region is a customer in the sense that we strive to provide an effective and efficient public service that benefits all within our region. More than two-thirds of adults in the region ride TriMet at least occasionally, but 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 sustainability, and community benefits, so we have also included them here.


Customers Goal 1: Satisfied Riders


OBJECTIVE		STATUS	RESULTS						
1. Provide safe service	FY2020	 Deployment strategy in development	<ul style="list-style-type: none"> ✓ Activating and now recording audio and video on internal bus cameras with view of operators and customers at farebox; all vehicles will be complete in FY2021 ✓ Succeeded through interest arbitration in installation of cameras and audio recording in light rail vehicle cabs; new vehicles will come with these while older vehicles will be retrofitted <ul style="list-style-type: none"> ▪ Developing scope of work informed by initial recommendations from safety and security advisory committee ▪ Presence on system increasing during FY2020 with new staff and altered work procedures for existing staff to increase time on board ▪ Training department structure overhauled and strategic training staff hired; Operations Training Strategy on track for completion and implementation steps in early FY2021 						
	FY2021-FY2025	MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
		Continue deployments based on strategy during FY2021	SP PE	<ul style="list-style-type: none"> ▪ Continuously engage with community groups and riders to meet safety needs on board and at TriMet facilities ▪ Implement updated security deployment strategies ▪ Develop quarterly reporting for safety and security advisory committee on fare enforcement program ▪ In collaboration with state, regional and local governments, develop policy framework and take initial steps for testing of non-revenue vehicles(s) with autonomous vehicle technology 	●	●	●	●	●

PE = Directly addresses a Point of Emphasis for FY2021
 SP = Directly addresses a Strategic Priority


 = on target

 = caution

 = off target





 = completed Key Strategic Action

**Customers Goal 1:
Satisfied Riders**

OBJECTIVE	STATUS	RESULTS
2. Increase ridership	 Average weekly boardings up 0.3 percent ²	<ul style="list-style-type: none"> ✓ Expanded the use of multicultural marketing firms and strategies (e.g., working with non-profits that have existing ties to cultural groups in the region) to increase awareness among current and potential riders of the benefits available from using Hop Fastpass® and Low-Income Fare program ✓ First- and last-mile shuttle services, connecting riders to TriMet service, to be operated by counties under HB2017 funding from state defined; service planned to start in 2020 <ul style="list-style-type: none"> ▪ Bus service hours budget increased 2.2 percent during FY2020, adding frequency and/or days of service to different lines around the region ▪ Continuing service enhancements funded by House Bill 2017 (HB2017) “Keep Oregon Moving” state funding; investments include battery electric buses, and the Low-Income Fare program; service funded by HB2017 defined in Public Transportation Improvement Plan³ through FY2023 ▪ More bus lane and intersection treatments installed in partnership with City of Portland, reducing travel times, improving reliability, and minimizing delays to bus riders; Rose lanes installed on approaches to downtown bridges and other locations, saving 20% - 50% of travel time and more in some locations ▪ Four transit-oriented development projects are in construction at TriMet sites and two more in negotiations⁴ ▪ New resident marketing packages for transit sent to thousands of households
		FY2020



	MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
FY2021-FY2025	Increased boardings during FY2021	SP	<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 piloting tourist-focused automated tours) ○ Increase employer fare program participation 	●	●	●	●	●
	2 percent annual percentage increase in boardings for bus and MAX by FY2022	PE	<ul style="list-style-type: none"> ▪ Enhance high-demand service with HB2017 funding that will result in significant ridership increases 	●	●	●	●	●





PE = Directly addresses a Point of Emphasis for FY2021
SP = Directly addresses a Strategic Priority

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

² for FY2020 through November compared to FY2019
³ <http://trimet.org/betterbus/ptip.htm>
⁴ As of early calendar 2020

Customers Goal 1:
Satisfied Riders

OBJECTIVE	STATUS	RESULTS					
3. Improve overall customer experience	 3.5 customer complaints ⁵ about personal safety and security per 100,000	 Increased visibility and frequency of customer service personnel on the system <ul style="list-style-type: none"> ▪ Increased frequency for detailed cleaning for MAX vehicles ▪ Bus maintenance performing DEEP Cleaning Protocol to enhance customer experience ▪ Starting agency-wide customer experience training by last quarter of FY2020 ▪ TriMet Riders' Club welcomed the 60,000th member during FY2020 ▪ Updating TriMet Pedestrian Plan to enhance access to transit by walking and using mobility devices 					
			FY2020				
MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
2.8 or fewer customer complaints about personal safety and security per 100,000 boardings	SP	<ul style="list-style-type: none"> ▪ Improve cleanliness of vehicles ▪ Expand customer information through technologies that support chat function 	●				
	SP	<ul style="list-style-type: none"> ▪ Complete agency-wide customer experience training 	●				
FY2021-FY2025							

SP = Directly addresses a Strategic Priority
 = on target  = caution  = off target  = completed Key Strategic Action

⁵ FY2020 to date as of end of December 2019

**Customers Goal 1:
Satisfied Riders**

OBJECTIVE	STATUS	RESULTS
4. Ensure equitable distribution of services and resources across the TriMet system	FY2020 <ul style="list-style-type: none"> ↑ Revenue hours provided ↑ Vehicle loads ↑ On-time performance ↑ Service availability ↑ Vehicle assignment – Bus ↑ Vehicle assignment – MAX Stop amenities: <ul style="list-style-type: none"> ↑ Seating ↑ Lighting ↑ Elevators ↑ Digital displays ↑ Shelters ↑ Signs, maps and/or schedules ↑ Waste receptacles 	<ul style="list-style-type: none"> ▪ All minority and/or low-income lines are better than, equal to, or within 5 percent average of non-minority and/or non-low-income lines on all measures ▪ FY2020 service changes again enhanced bus service in neighborhoods with high concentrations of persons of color and/or low-income ▪ Partnered with nearly 50 non-profits, social service agencies, colleges and universities to expand access to Low-Income Fare program⁶ ▪ Low-income fare program has over 26,000 participants, ahead of schedule



MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
FY2021-FY2025 Minority and low-income access within five percent, equal, or better compared to 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 	SP	<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 	●	●	●	●	●
	SP	<ul style="list-style-type: none"> ▪ 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 	●	●	●	●	●
	SP	<ul style="list-style-type: none"> ▪ Implement updated TriMet Language Access Plan 	●	●	●		
	SP	<ul style="list-style-type: none"> ▪ Test equity lens, working with community partners, Transit Equity Advisory Committee, the Coalition of Communities of Color, and the Center for Equity and Inclusion 	●				
	SP	<ul style="list-style-type: none"> ▪ Implement equity lens 		●			

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 ✓ = completed Key Strategic Action

⁶ <http://news.trimet.org/2019/12/video-trimet-partners-with-nearly-50-organizations-to-expand-access-to-low-income-fare/>

Customers Goal 1:
Satisfied Riders

OBJECTIVE	STATUS	RESULTS
5. Improve customer information and services	 Implemented improvements under Customer Information Strategy	 Completed district-wide, in-depth events and engagement to assist customers in taking best advantage of Hop Fastpass® and Low-Income Fare Program
		<ul style="list-style-type: none"> ▪ Piloting new digital information screens in preparation for replacement of all old screens in FY2021 - FY2023 ▪ Introduction of new trimet.org site with enhanced functions and new enhanced multimodal trip planner scheduled for Spring 2020 to improve customer information regarding trip planning and provide more mobility options for each trip using quality, cost-effective open-source information technology

MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
			Implementation steps for customer information strategy during FY2020	<p>SP</p> <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 ▪ Enhance technology and partnership protocols in support of mobility management and mobility as a service to provide frictionless information and travel for customers ▪ Encourage cities, counties, and state to implement policies and procedures that support comprehensive and frictionless information on mobility options: <ul style="list-style-type: none"> ○ Research opportunities and needs ○ Develop and pilot approaches ○ Implement identified approaches that result in policies and procedures that support mobility options 	●	●	●

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Customers Goal 2:
Satisfied Community Stakeholders and Employers





OBJECTIVE	STATUS		RESULTS						
6. Help shape the future of cities and our region in line with Metro 2040 Growth Concept	FY2020	<p><i>Access to housing and employment measures⁷:</i></p> <p>Housing units:</p> <ul style="list-style-type: none"> ↑ 14.2 percent near MAX (increased from 14.1 percent) ■ 32.2 percent near Frequent Service Bus (decreased from 32.3 percent) ■ 86.4 percent near all transit (decreased from 86.5 percent) <p>Employment:</p> <ul style="list-style-type: none"> ■ 27.5 percent near MAX (decreased from 27.9 percent) ■ 24.7 percent near Frequent Service bus (decreased from 24.8 percent) ■ All transit (decreased to 93.0 percent) 	<ul style="list-style-type: none"> ▪ Housing and employment development continues to occur around light rail and Frequent Service bus consistent with regional and local development strategies; the value of development within an easy walking distance of MAX stations is now estimated at well over \$25 billion ▪ Four transit-oriented development projects are in construction at TriMet sites and two more in negotiations ▪ Using grant from Oregon Department of Transportation to develop transit-oriented development station area planning including approaches to broaden community engagement 						
		FY2021-FY2025	Focus	SP	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24
		<p>Percentage of housing development and employment within walking distance of MAX, Division Transit Project, and Frequent Service bus greater than or equal to previous year</p>		<ul style="list-style-type: none"> ▪ Implement framework and approach for TriMet's support of transit-oriented development equitable housing and for value capture that supports transit demand around MAX, Division Transit Project, and Frequent Service bus, including management of real property and underutilized Park & Ride lots, including: <ul style="list-style-type: none"> ○ Complete station-area development strategy under grant from Oregon Department of Transportation 	●	●	●	●	●

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⁷ As of November 2019

Customers Goal 2:
Satisfied Community Stakeholders and Employers

OBJECTIVE	STATUS	RESULTS															
7. Ease congestion by providing attractive travel options during peak periods	 28.1 percent ⁸ of travelers in Banfield and Sunset corridors during peak hour in peak direction rode MAX (down from 29.4 percent)	<ul style="list-style-type: none"> Federal Transit Administration granted Authority to enter Project Development for Red Line Extension and Reliability Improvements Project and cleared environmental review Added peak hour bus service on multiple lines Purchasing a pilot battery electric 60-foot bus (more capacity than current TriMet buses) for testing in FY2021 															
	<table border="1"> <thead> <tr> <th>MEASURE / TARGET</th> <th>Focus</th> <th>KEY STRATEGIC ACTIONS</th> <th>FY21</th> <th>FY22</th> <th>FY23</th> <th>FY24</th> <th>FY25</th> </tr> </thead> <tbody> <tr> <td>Percentage of travel on MAX as percent of all travel in Banfield and Sunset corridors during peak period equal to or greater than previous year</td> <td>PE</td> <td> <ul style="list-style-type: none"> Finalize design and implement Red Line extension to Fairplex and MAX system improvements to Gateway and Airport tracks using funding from Federal Transit Administration Small Starts Program </td> <td>●</td> <td>●</td> <td>●</td> <td>●</td> <td></td> </tr> </tbody> </table>	MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25	Percentage of travel on MAX as percent of all travel in Banfield and Sunset corridors during peak period equal to or greater than previous year	PE	<ul style="list-style-type: none"> Finalize design and implement Red Line extension to Fairplex and MAX system improvements to Gateway and Airport tracks using funding from Federal Transit Administration Small Starts Program 	●	●	●	●	
MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25										
Percentage of travel on MAX as percent of all travel in Banfield and Sunset corridors during peak period equal to or greater than previous year	PE	<ul style="list-style-type: none"> Finalize design and implement Red Line extension to Fairplex and MAX system improvements to Gateway and Airport tracks using funding from Federal Transit Administration Small Starts Program 	●	●	●	●											





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⁸ Data comparing Oregon Department of Transportation traffic counts with TriMet peak MAX ridership, both in Fall 2019

Customers Goal 2:
Satisfied Community Stakeholders and Employers

OBJECTIVE	STATUS	RESULTS																												
8. Support the region's economy by expanding employee access to jobs and customer access to businesses and services	FY2020	<ul style="list-style-type: none"> 93.0 percent of employment within walking distance of transit (down from 93.1 percent) 96.9 percent of retail within walking distance of transit (down from 97 percent last year) 																												
		<ul style="list-style-type: none"> ✓ Provided comprehensive outreach and engagement encouraging participation in Low-Income Fare⁹ program through Hop Fastpass® to be paid for with state funding from HB2017 ✓ First- and last-mile services defined with partners and targeted for funding through HB2017, with start of service planned for FY2021 ▪ "Rose Lane" bus priority lanes installed in multiple locations with City of Portland to improve bus operations and encourage additional development along frequent transit lines 																												
	<table border="1"> <thead> <tr> <th>MEASURE / TARGET</th> <th>Focus</th> <th>KEY STRATEGIC ACTIONS</th> <th>FY21</th> <th>FY22</th> <th>FY23</th> <th>FY24</th> <th>FY25</th> </tr> </thead> <tbody> <tr> <td>Percent of employment accessible by transit equal to or greater than previous year</td> <td></td> <td> <ul style="list-style-type: none"> ▪ 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 </td> <td></td> <td>●</td> <td>●</td> <td>●</td> <td>●</td> </tr> <tr> <td>Percent of retail accessible by transit equal to or greater than previous year</td> <td>PE</td> <td> <ul style="list-style-type: none"> ▪ Develop steps with partners to implement future pilot connecting service(s) using autonomous vehicle technology ▪ Continue outreach to expand use of Low-Income Fare program </td> <td>●</td> <td>●</td> <td>●</td> <td>●</td> <td>●</td> </tr> </tbody> </table>	MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25	Percent of employment accessible by transit equal to or greater than previous year		<ul style="list-style-type: none"> ▪ 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 		●	●	●	●	Percent of retail accessible by transit equal to or greater than previous year	PE	<ul style="list-style-type: none"> ▪ Develop steps with partners to implement future pilot connecting service(s) using autonomous vehicle technology ▪ Continue outreach to expand use of Low-Income Fare program 	●	●	●	●	●					
MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25																							
Percent of employment accessible by transit equal to or greater than previous year		<ul style="list-style-type: none"> ▪ 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 		●	●	●	●																							
Percent of retail accessible by transit equal to or greater than previous year	PE	<ul style="list-style-type: none"> ▪ Develop steps with partners to implement future pilot connecting service(s) using autonomous vehicle technology ▪ Continue outreach to expand use of Low-Income Fare program 	●	●	●	●	●																							

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⁹ <http://trimet.org/lowincome>

Customers Goal 2:
Satisfied Community Stakeholders and Employers

OBJECTIVE	STATUS	RESULTS
<p>9. Advance mobility for those with limited options</p>	<p>FY2020</p> <ul style="list-style-type: none"> Projected 15.6 million¹⁰ boardings on fixed route service by seniors and persons with disabilities (down from 15.7 million) Cost per ride on LIFT service increased 6.2 percent (which was above inflation¹¹) 	<ul style="list-style-type: none"> Implemented LIFT C.A.R.E.S (Customer Automated Ride Experience System), an automated call-back function for LIFT riders 33% of Hop Fastpass® taps during the past year were for Honored Citizen customers as of December 2019 Hop Fastpass® implementation for LIFT customers is underway and on-track for completion during FY2021; several thousand LIFT customers are now using Hop Fastpass® for paratransit rides, with more transitioning over time


MEASURE / TARGET	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
<p>FY2021-FY2025</p> <p>Boardings for seniors and persons with disabilities provided on fixed route service equal to or greater than previous year</p> <p>Cost/ride on LIFT service at or below targeted budget amount</p>	<ul style="list-style-type: none"> Implement pilot project for demand responsive service for seniors and persons with disabilities Complete updated and fully-compliant Coordinated Transportation Plan for Seniors and Persons with Disabilities 		●	●	●	

 = on target
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¹⁰ Projected based on current trends as of November 2019





¹¹ Twelve-month average as of November 2019, compared to 2.5% November 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>

Customers Goal 2:
Satisfied Community Stakeholders and Employers

OBJECTIVE	STATUS	RESULTS
10. Improve environmental sustainability and stewardship	 Purchased and placed into service first five electric buses and placed orders for more from multiple manufacturers to test operations and reliability FY2020	<ul style="list-style-type: none"> Announced eight initiatives to address climate change¹², including: (1) operate MAX with 100% wind power; (2) no diesel bus purchases after 2025; (3) fuel existing fixed-route buses with renewable diesel; (4) replace non-bus light-duty vehicles with electric vehicles by 2030 and transition heavy-duty vehicles to renewable diesel; (5) support Youth Pass program; (6) conduct baseline analysis of carbon emissions and develop net zero carbon strategy; (7) develop a carbon lens; and (8) support regional air quality testing Ordered retrofitted buses, repowered from diesel to battery electric for testing in service. Includes one 60-foot-long articulated bus, which will be the first one in the US using new electric propulsion system Tested renewable diesel for emissions and performance; switching fixed-route bus fleet to renewable diesel Instituted new Oil Guard Program on buses, reducing annual engine oil use by 12,500 gallons <p><i>Note: More results related to bus electrification detailed in Objective 22</i></p>

MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
			FY2021-FY2025	Progress on initiatives to address climate change	SP SP <i>Note: Actions to accomplish shift to non-diesel buses and reduce carbon footprint of operations are detailed in Objective 22</i>	●	●

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¹² <http://news.trimet.org/2019/12/trimet-announces-major-actions-to-reduce-its-carbon-footprint/>

Customers Goal 3:
Satisfied Broader Community


OBJECTIVE	STATUS	RESULTS
11. Ensure strong support for transit and TriMet	FY2020 ↑ Overall public approval rating for TriMet at 72 percent (76 percent for riders)	<ul style="list-style-type: none"> Approval rating at 76 percent for riders¹³ and 72 percent for combined riders and non-riders, higher than other regional public agencies Engaged public and provided information about budget development, service planning (four open houses and additional outreach and engagement), state-funded services, and transit improvement projects such as Division Transit Project, Southwest Corridor Project, MAX Red Line Extension and Reliability Improvements Project, Columbia bus garage, and many other, smaller projects scattered across the district

	MEASURE / TARGET	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
	FY2021-FY2025 Approval rating between 70 and 75 percent in TriMet public survey (combined riders and non-riders)	<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 engaging our low-income and minority riders Amend Public Transit Improvement Plan to conform with FY2022 - FY2023 State Transit Improvement Fund application requirements, with substantial public engagement and full compliance with state requirements Provide to voters facts, data, and information that demonstrate the clear need for additional public transportation investment Engage community for the Line 2-Division service reallocation when Division Transit Project begins service, including culturally specific outreach 	●	●	●	●	

 = on target	 = caution	 = off target	 = completed Key Strategic Action
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¹³ Respondents who “strongly approve” or “somewhat approve” of “the job TriMet is doing”, November 2019 TriMet survey

Customers Goal 3:
Satisfied Broader Community

OBJECTIVE	STATUS	RESULTS								
12. Increase funding for regional mobility expansion	 Completed Division Transit Project funding	<ul style="list-style-type: none"> Division Transit Project secured funding from Federal Transit Administration and begins construction in FY2020 Pursuing federal funding for Red Line Extension and Reliability Improvements Project through Federal Transit Administration Small Starts grant Provided information and design and engineering input to Metro proposed regional transportation improvements 								
FY2020	MEASURE / TARGET	KEY STRATEGIC ACTIONS				FY21	FY22	FY23	FY24	FY25
	Needed investments in Southwest Corridor obtained: FY2021	<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 Secure funding commitments and Memoranda of Understanding or Intergovernmental Agreements regarding funding for Southwest Corridor 				●	●	●	●	●
FY2021-FY2025										

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Internal Business Practices

Internal Business Practices Goal 1: Deliver Safe, Efficient, and Equitable Service

OBJECTIVE	STATUS	RESULTS
13. Increase personal safety	1.3 passenger injuries per million boardings Zero preventable deaths occurred Collisions per 100,000 miles ¹⁴ : Bus: 2.9 MAX: 1.2 LIFT: 1.0 WES: 0.0	<ul style="list-style-type: none"> Installed improvements to prioritized crossings in Rail Pedestrian Safety Enhancements Project including SE 10th Ave/ SE Washington St and Merlo Rd/ SW 158th Ave Draft of Public Transportation Agency Safety Plan already completed; on-schedule to complete fully FTA-compliant final Plan and submit to Oregon Department of Transportation before federally-defined deadline of July 20, 2020
	FY2020	

	MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
FY2021-FY2025	1.9 or fewer passenger injuries per million boardings	SP	<ul style="list-style-type: none"> Submit fully FTA-compliant Public Transportation Agency Safety Plan to Oregon Department of Transportation before July 20, 2020 Procure Safety Management System tracking software Develop and implement configuration management and/or process change management system to track changes and implementations across divisions to ensure safety and security, and also cultivate broader operational and functional benefits Increase high-visibility presence on system Continue analysis and implementation of treatments at locations for rail crossing safety enhancements Complete and implement operations training strategy 	●				
	Zero preventable deaths	SP		●	●			
	Collisions per 100,000 miles	PE		●				
	<ul style="list-style-type: none"> Bus: 2.6 MAX: 1.3 LIFT: 1.3 WES (per year): <1 	SP		●	●	●	●	●
		PE		●	●			

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¹⁴ Twelve-month average as of November 2019.

Internal Business Practices Goal 1:
Deliver Safe, Efficient, and Equitable Service

OBJECTIVE	STATUS	RESULTS	
14. Provide reliable performance	FY2020	On-time performance: Bus: 85.5 percent ¹⁵	<ul style="list-style-type: none"> ▪ MAX on-time performance improved again ▪ Replacing components on Type 2 and 3 MAX vehicles to reduce service disruptions; for example, MAX door sensors on Type 2 and 3 MAX vehicles account for approximately 20 percent of all service delays greater than 5 minutes; the primary component involved will be completely replaced by the end of FY2020 ▪ Bus maintenance implemented new preventive maintenance program which increased “mean distance between failures” (how far an average bus travels in service before it needs unscheduled attention or repair) meaning more reliability and fewer disrupted trips for customers ▪ New Type 6 MAX vehicles have been ordered and original Type 1 MAX vehicles (which started revenue service in 1986) will be replaced during FY2022 and FY2023 ▪ Green Line Hot Weather Modifications Project will allow the Line to travel at posted speeds in temperatures up to 100 degrees Fahrenheit
	MAX: 89.5 percent		
	LIFT: 89.8 percent ¹⁶		
	WES: 96.4 percent		
	On-time performance on minority and low-income lines better than or within 5 percent of non-minority and non-low-income lines		

MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25															
FY2021-FY2025	SP	<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;"> <thead> <tr> <th></th> <th>FY2021</th> <th>FY2022</th> </tr> </thead> <tbody> <tr> <td>Bus</td> <td>84.4 percent</td> <td>85 percent</td> </tr> <tr> <td>MAX</td> <td>89 percent</td> <td>90 percent</td> </tr> <tr> <td>LIFT</td> <td colspan="2" style="text-align: center;">93.5 percent</td> </tr> <tr> <td>WES</td> <td colspan="2" style="text-align: center;">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>		FY2021	FY2022	Bus	84.4 percent	85 percent	MAX	89 percent	90 percent	LIFT	93.5 percent		WES	95 percent		●	●	●	●	●
				FY2021	FY2022																	
			Bus	84.4 percent	85 percent																	
			MAX	89 percent	90 percent																	
			LIFT	93.5 percent																		
WES	95 percent																					
PE	<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) ▪ Implement internal information technology strategic plan 	●	●	●	●	●																

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¹⁵ Bus and MAX performance numbers are FY2020 average through November 2019
¹⁶ LIFT and WES performance numbers are 12 month average through November 2019

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Internal Business Practices Goal 1:
Deliver Safe, Efficient, and Equitable Service

OBJECTIVE	STATUS ¹⁷	RESULTS
15. Improve service delivery	156.9 miles of MAX and Frequent Bus lines	<ul style="list-style-type: none"> Acquired land and began design for Columbia bus garage Rose Lane bus priority treatments in City of Portland installed to improve travel times Implementing Enterprise Content Management System in multi-year roll-out Downtown MAX average speed same as previous at 7.2 mph (including stations and stops) Implemented new Project Management Office to more clearly prioritize information technology investments and focus on high quality implementation of IT systems and projects; completed agency-wide prioritization of IT projects to support development of two-year strategic roadmaps for implementation
	2.2 percent overloaded peak trips on MAX and Bus (up from 1.9 percent)	
	13.6 mph on bus (same as previous)	
	17.9 mph on MAX (same as previous)	
	Vehicle loads on minority and low-income lines as good or better than non-minority and non-low income lines	




MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
FY2021-FY2025 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	PE SP	<ul style="list-style-type: none"> Begin implementation of Rail Operations Optimization Technology, providing more data about MAX vehicles to support reliability and new technologies Complete scope and design for Columbia bus garage Expand service with HB2017 funding, with enhanced service to low-income communities, including service to East Portland and East Multnomah County Complete Service Planning assessment and implement recommended actions Implement Scheduling assessment recommendations Implement Enterprise Content Management System Complete overall agency-wide facilities master plan to enable efficient future growth 	●	●			
			●	●	●		
			●	●			
			●	●	●	●	●
			●	●			●





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¹⁷ As of late calendar year 2019

Internal Business Practices Goal 1:
Deliver Safe, Efficient, and Equitable Service

OBJECTIVE	STATUS		RESULTS						
16. Increase resiliency	FY2020	 All-Hazards Emergency Management Plan on schedule	 Continuity of Operations Plan completed	<ul style="list-style-type: none"> First full All-Hazards Emergency Management Plan approved by the Oregon Department of Transportation 					
		 Continuity of Operations Plan completed							
	FY2021-FY2025	MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS					
		Annual update of All-Hazards Emergency Management Plan (includes earthquake preparedness and climate change resilience) completed each year	PE	<ul style="list-style-type: none"> Implement broad-based All-Hazards Emergency Management Plan including Earthquake, extreme weather, and climate change and review of standards, design criteria, procurements, redundancy, and projects for long-term resilience; update annually Provide annual training to Emergency Operations Center staff on emergency management roles and activities 	FY21	FY22	FY23	FY24	FY25
				<ul style="list-style-type: none"> ● ● ● ● ● 	●	●	●	●	●

PE = Directly addresses a Point of Emphasis for FY2021			
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Internal Business Practices Goal 2:
Design and Deliver Successful Projects

OBJECTIVE	STATUS		RESULTS					
17. Develop higher-capacity bus services	FY2020	 Division Transit Project on schedule	 Completed Federal Transit Administration requirements for Project Development on Division Transit Project					
			<ul style="list-style-type: none"> ▪ Division Transit Project on schedule to receive \$87.9 million grant from Federal Transit Administration 					
	MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
FY2021-FY2025	Division Transit Project in service: Fall 2022	PE	<ul style="list-style-type: none"> ▪ For Division Transit Project: <ul style="list-style-type: none"> ○ Construct Project ○ Deliver next generation transit signal priority on Division ○ Take delivery of Division Transit Project higher-capacity buses and then place into revenue service ▪ Introduce higher-capacity buses on other bus lines: <ul style="list-style-type: none"> ○ Test on other bus lines ○ Implement on other bus lines 	●	●	●		
				●	●	●	●	●





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  = completed Key Strategic Action

Internal Business Practices Goal 2:
Design and Deliver Successful Projects


OBJECTIVE	STATUS	RESULTS
18. Develop partnerships to support faster and more reliable bus service	 On schedule for three delay points and two extended transit corridor projects implemented during FY2020 ¹⁸ .	<ul style="list-style-type: none"> City of Portland installed bus transit priority improvements at multiple locations including approaches to Hawthorne, Burnside, and Steel Bridges, which collectively improved travel times on 13 bus lines including seven Frequent Service lines Developed with city and county partners multiple bus priority concepts for consideration of funding in regional transportation funding measure

	MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25	
				FY2021-FY2025	Implement five transit priority improvements that decrease transit peak delay by 10% or more	PE PE PE PE	<ul style="list-style-type: none"> Implement pilot Enhanced Transit bus priority improvements Ensure Enhanced Transit Concept bus priority projects are referred to the voters by May 2020 and included in the regional transportation funding measure in November 2020 If funding measure is successful, implement bus priority projects across the region Increase supportive policies for improving transit travel time and performance with cities, counties, METRO, and Oregon Department of Transportation Complete market study of freeway express and limited-stop bus services Pilot feasibility of faster limited-stop bus service including potential use of freeway shoulders 	●	●
				●		●	●	●	●

PE = Directly addresses a Point of Emphasis for FY2021			
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
¹⁸ As of December 2019

Internal Business Practices Goal 2:
Design and Deliver Successful Projects



OBJECTIVE	STATUS	RESULTS
19. Meet milestones for successful development of Southwest Corridor	 Project continues on pace for FY2020	<ul style="list-style-type: none"> Southwest Corridor Steering Committee unanimously approved Locally Preferred Alternative to Bridgeport (with minimum operable segment south of Downtown Tigard)
		<ul style="list-style-type: none"> Engaged public regarding design, environmental benefits, potential impacts of project, and equitable development through community groups and events.

MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
			FY2021-FY2025	PE	<ul style="list-style-type: none"> For Southwest Corridor: <ul style="list-style-type: none"> Complete Southwest Corridor Federal Transit Administration Project Development Complete Conceptual Design Report and present to Steering Committee for adoption Continue public engagement on project Deliver full information to the public and stakeholders and focus on regional funding measure for November 2020 	●	●

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Internal Business Practices Goal 2:
Design and Deliver Successful Projects

OBJECTIVE	STATUS	RESULTS						
20. Improve existing MAX infrastructure for reliability and capacity	 Planned projects completed FY2020	 Completed control and signal improvements at Rose Quarter and Lloyd District <ul style="list-style-type: none"> ▪ Red Line Extension and Reliability Improvements Project includes substantial reliability and capacity improvements on Red Line that will improve throughput and resilience at Gateway Transit Center, which will address operations issues for Red, Blue, and Green MAX Lines ▪ Improvements to signal systems at Cleveland on schedule for completion by end of FY2020 						
		MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24
FY2021-FY2025	Programmed switch, track, control, and systems improvements completed: before end of FY2021	SP	<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"> ○ Develop and implement a complex Steel Bridge Rehabilitation Project while minimizing disruptions to customers ○ Complete switch, track, control and systems improvements at Cleveland 	●	●	●	●	●

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Internal Business Practices Goal 3:
Business Practices that Create Value and Spur Innovation and Continuous Improvement

OBJECTIVE	STATUS	RESULTS										
21. Maximize benefits and potential of Hop Fastpass®	FY2020  80.7 percent ¹⁹ of fares collected through Hop Fastpass®  Over 100 percent increase in total monthly Hop Fastpass® taps over previous year	<ul style="list-style-type: none">  Phased out paper fares (excluding LIFT paratransit and fixed-route bus ticket printer fares) with robust public engagement  Completed conversion of institutional pass users to Hop Fastpass® system  Encouraged Oregon transit agencies and other entities to implement Hop Fastpass®, including supporting Oregon Department of Transportation effort to identify potential for small transit agencies in Oregon to adopt the system <ul style="list-style-type: none"> ▪ Hop Fastpass® implementation for LIFT customers is well underway; several thousand LIFT customers can now use Hop Fastpass® for fixed route and paratransit rides, with full transition expected by end of FY2021 										
	FY2021-FY2025 MEASURE / TARGET Increase percent of fares collected through Hop Fastpass®	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> ▪ Conduct strategic review of additional benefits possible with Hop Fastpass® including marketing and service planning ▪ Assess and develop business case for integrated payment of mobility services ▪ Integrate use of Hop Fastpass® for all LIFT customers ▪ Integrate Hop Fastpass® for accessible transportation program contracted transportation provider services <table border="1" data-bbox="1780 651 1959 963"> <thead> <tr> <th data-bbox="1780 651 1812 740">FY21</th> <th data-bbox="1812 651 1843 740">FY22</th> <th data-bbox="1843 651 1875 740">FY23</th> <th data-bbox="1875 651 1906 740">FY24</th> <th data-bbox="1906 651 1938 740">FY25</th> </tr> </thead> <tbody> <tr> <td data-bbox="1780 740 1812 963">●</td> <td data-bbox="1812 740 1843 963">●</td> <td data-bbox="1843 740 1875 963">●</td> <td data-bbox="1875 740 1906 963">●</td> <td data-bbox="1906 740 1938 963">●</td> </tr> </tbody> </table>	FY21	FY22	FY23	FY24	FY25	●	●	●	●	●
FY21	FY22	FY23	FY24	FY25								
●	●	●	●	●								

¹⁹ As of December 2019

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Internal Business Practices Goal 3:
Business Practices that Create Value and Spur Innovation and Continuous Improvement

OBJECTIVE	STATUS	RESULTS						
22. Reduce TriMet's carbon footprint	 Five battery electric buses operating in revenue service	 Assessed viability of battery electric buses; although reliability issues with buses have reduced service early on, the results are promising enough to have committed to purchasing more; TriMet is purchasing buses from multiple manufacturers (including a company that rebuilds older buses and converts them to battery electric) to compare reliability and efficiency <ul style="list-style-type: none"> ▪ First five battery buses in service ▪ Additional battery electric buses, converted from diesel, expected summer 2020 ▪ More new battery electric buses on order ▪ Bus charging stations for planned electric bus purchases under construction at Powell garage; bus charging stations planned for new Columbia garage 						
	FY2020	MEASURE / TARGET	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
	FY2021-FY2025	Procure and operate non-diesel buses on-time based on TriMet Non-Diesel Bus Plan ²⁰	<ul style="list-style-type: none"> ▪ Implement TriMet's Non-Diesel Bus Plan: Purchase additional non-diesel buses during five year period while continuing to evaluate cost and service reliability ▪ Complete installation of first 24 bus electric charging stations at Powell garage; install six more charging stations at Merlo garage ▪ Finalize scope and designs at future Columbia Garage to ensure it will be compatible with electric charging infrastructure needs ▪ Test retrofitted battery electric buses ▪ Ensure all bus purchases after FY2024 are non-diesel ▪ Develop long-term carbon reduction strategy 	●	●	●	●	●

²⁰ <http://trimet.org/electricbuses/pdf/TriMet-Non-Diesel-Bus-Plan-September-2018.pdf>


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Internal Business Practices Goal 3:
Business Practices that Create Value and Spur Innovation and Continuous Improvement

OBJECTIVE		STATUS	RESULTS					
23. Grow business inclusion and diversity efforts	FY2020	 Improved ability to encourage and track participation in contracting opportunities	 Conducted outreach events to certified firms, minority chambers, and small business advocacy organizations to expand awareness of contracting opportunities <ul style="list-style-type: none"> ▪ Forming a TriMet Small Business Equity Advisory Committee and working to remove/reduce known barriers to small businesses contracting with TriMet ▪ Purchasing new software during FY2020 to effectively and accurately track certified business utilization across all departments and contract thresholds to inform areas of opportunity ▪ Hosting semi-annual networking events for small businesses interested in working on TriMet projects to connect with Project Managers 					
	FY2021-FY2025	MEASURE / TARGET	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
		Completed agency-wide certified contracting strategy: by end of FY2021	<ul style="list-style-type: none"> ▪ Implement contracting participation strategy to enhance contracting opportunities and participation by certified firms ▪ Map small business locations by TriMet districts and develop strategic outreach aligned with TriMet's contracting needs ▪ Provide small business technical assistance and workforce development on TriMet capital projects; as well as development and implementation of a program to train for culturally competent management on TriMet construction sites, beginning with Division Transit Project as a pilot project 	●	●			

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Internal Business Practices Goal 3:
Business Practices that Create Value and Spur Innovation and Continuous Improvement

OBJECTIVE	STATUS	RESULTS						
24. Innovatively increase financial resources	 Multiple development projects sold or making progress toward development	<ul style="list-style-type: none"> Transitioning leases into Real Estate group to review for revenue and cost saving opportunities Received Oregon Department of Transportation grant for station-area planning to support future development During FY2019, the last full year for which data is available, TriMet brought in almost \$4 million in competitive grants to fund such activities as purchasing electric buses and implementing bus priority treatments 						
		FY2020						
	MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
FY2021-FY2025	Milestones for strategy to leverage current TriMet assets	SP SP SP	<ul style="list-style-type: none"> Review leases for revenue and cost-saving opportunities Encourage transit-oriented development that increases off-peak and weekend transit ridership to take advantage of available capacity of existing services and pursue value capture Review Capital Improvement Plan and current plans and map to prospective grant or other funding sources; apply to viable opportunities 	●	●	●	●	●

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People & Innovation





People & Innovation Goal 1: Ensure a Culture of Safety

OBJECTIVE	STATUS	RESULTS							
25. Successfully implement the Safety Management System across the organization	FY2020	<ul style="list-style-type: none"> ↑ Seven safety audits performed to date during FY2020 ↑ 4.6 lost time injuries rate (per 200,000 hours worked) 	<ul style="list-style-type: none"> ▪ Reviewing MAX right-of-way for risk of safety-related incidents ▪ Bus panels for operator safety are included in all new bus orders ▪ On-schedule with development of Public Transportation Agency Safety Plan 						
	FY2021-FY2025	MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
		5.4 per 200,000 hours or lower lost time injuries rate: FY2022	<ul style="list-style-type: none"> SP SP 	<ul style="list-style-type: none"> ▪ Complete Public Transportation Agency Safety Plan, compliant with Federal Transit Administration requirements, and start implementation ▪ Engage all departments to increase departmental assumption of responsibility for safety and expansion of culture of safety (steps include incorporating safety into personnel objectives; review of departmental incident and injury data; departments taking appropriate action; proactive identification of risks and hazard mitigation) 	●	●	●	●	●

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People & Innovation Goal 2:
TriMet is Where Diverse and Talented People Want to Come, Stay, and Thrive

OBJECTIVE	STATUS	RESULTS
26. Invest wisely in people	 4.8 average score on quarterly engagement survey (6 is best)  4.0 percent training and development costs ²¹  26 percent ²² of employees below their predicted compensation (average ratio for those under target is 0.94)  7.5 percent turnover percentage ²³	<ul style="list-style-type: none"> Conducting agency-wide engagement survey of employees to guide future efforts Redesigned and implemented predicted compensation model (PCM) to increase competitiveness and candidate pool Increased understanding and ownership of PCM pay practices by including hiring manager in process and by conducting over 50 manager/employee information forums Established market survey tool to better identify comparison to market's comparable positions Building tool for agency-wide analysis to ensure legal compliance and increase flexibility of pay practices Invested in 1-on-1 follow-on coaching for leadership development program participants Expanded internal training and educational opportunities Increased participation in tuition reimbursement program Now offering library of eLearning modules to increase self-paced learning opportunities for all
	FY2020	

	MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
FY2021-FY2025	4.6 or better on engagement survey ²⁴ (6 is best) At least four percent training and development costs as a percentage of payroll For employees in comparable character groupings, 100 percent attainment of PCM and compliance of pay equity requirements ²⁵ : FY2023 For employees in non-comparable character groupings, 90 percent within 3 percent of PCM No more than five percent turnover percentage – minus retirements from agency	PE	<ul style="list-style-type: none"> Implement revised PCM to strengthen performance factor Develop Professional and Leadership Development Strategy Implement Learning Management System, including eLearning Conduct needs assessment and gap analysis for professional and leadership skills and competencies Identify and secure additional work space as needed to accommodate TriMet's growing workforce Conduct agency-wide market analysis of competitive pay rates Building tool for scheduled agency-wide analysis to ensure legal compliance and increase flexibility of pay practices Redesign Performance Development Program to support PCM pay practices and strengthen Career Development 	●	●	●		

²¹ FY2019 data (latest currently available) as a percentage of total payroll including tuition reimbursement

²² Specific target not set for FY2020; green arrow indicates progress from previous year

²³ Overall employees minus retirements


²⁴ Benchmark based on other employers in similar industries

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

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People & Innovation Goal 2:
TriMet is Where Diverse and Talented People Want to Come, Stay, and Thrive


OBJECTIVE	STATUS	RESULTS
FY2020	<p> Quantum employee survey results from communication question (“There is open and honest communication between employees and manager”) averaged 4.1 (on a 1-6 scale) as of December 2019 pulse check engagement survey</p>	<ul style="list-style-type: none"> Developed reporting tools (regarding, e.g., pullouts, rule violations, attendance, etc.) that supervisors can reference in discussions with customer-serving employees and providing data to Transportation management to develop performance scoreboards at each garage Preparing to conduct engagement survey of employees in February 2020 to check status and use results to guide future efforts on agency, division, and department levels

FY2021-FY2025	MEASURE / TARGET	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
	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"> Provide additional scoreboards and data reports to facilitate honest and fair performance discussions between supervisors and operators Develop and communicate better-defined expectations and priorities for operations departments’ performance review meetings as well as specific actions to improve performance Conduct regular employee engagement pulse survey and focus group, representing all divisions, a variety of roles and grade levels, and both union and non-union employees Implement actions in response to needs identified from engagement survey 	●	●			

²⁶ Benchmark based on other employers in similar industries

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People & Innovation Goal 2:
TriMet is Where Diverse and Talented People Want to Come, Stay, and Thrive

OBJECTIVE	STATUS	RESULTS
28. Foster sense of community and cross-functional camaraderie	 603 employees participated in volunteer events ²⁷ (336 community benefit and 267 TriMet internal and service opportunities)	<ul style="list-style-type: none"> Offered volunteer opportunities to benefit community causes through “Team TriMet” and other opportunities, including Pride Parade, Children’s Book Bank, and the Great Slough Clean Up Volunteer efforts to support TriMet colleagues such as Bus Rodeo, holiday dinners, and Culture Day Celebrated 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)

MEASURE / TARGET	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
		Trend in number of employees participating in external- and colleague-serving volunteer events shows positive growth over previous years	<ul style="list-style-type: none"> Offer multiple Team TriMet volunteer events each year and emphasize recruitment across all divisions Executive management participate in at least two events highly visible to TriMet employees each year such as Holiday Dinner, Pride Parade, Heart Walk, Rodeo, Ride Guide, Culture Day, etc. 	●	●	●
FY2021-FY2025		●	●	●	●	●

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²⁷ Calendar year 2019 totals as compared to calendar 2018 totals. Status on target determined by whether three-year running average shows positive growth.

People & Innovation Goal 2:
TriMet is Where Diverse and Talented People Want to Come, Stay, and Thrive

OBJECTIVE	STATUS			RESULTS
29. Achieve agency Affirmative Action goals FY2020	Actual (FY2019)	Non-union Jobs	All Jobs	<ul style="list-style-type: none"> Outreach about openings, especially in Maintenance, at job fairs, broader set of online opportunities with efforts to focus on diverse candidates, working with community organizations that support diverse communities as well as refugees and veterans Hiring Well and Bias Busting classes now required 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				

MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25																
Utilization rates are equal to or exceed weighted average availability rates in TriMet's Affirmative Action Plan ²⁸ for management positions and all TriMet District positions: end of FY2020 <table border="1" style="width: 100%;"> <thead> <tr> <th style="text-align: center;">Targets²⁹</th> <th style="text-align: center;">Non-union Jobs</th> <th style="text-align: center;">All Jobs</th> </tr> </thead> <tbody> <tr> <td>Minority</td> <td style="text-align: center;">16.6 percent</td> <td style="text-align: center;">23.3 percent</td> </tr> <tr> <td>Women</td> <td style="text-align: center;">37 percent</td> <td style="text-align: center;">29 percent</td> </tr> <tr> <td>Veteran</td> <td style="text-align: center;">6.4 percent</td> <td style="text-align: center;">6.4 percent</td> </tr> <tr> <td>Persons with Disabilities</td> <td style="text-align: center;">7 percent</td> <td style="text-align: center;">7 percent</td> </tr> </tbody> </table> Utilization rate for executive positions is equal to or exceeds availability rates in TriMet's Affirmative Action Plan	Targets ²⁹	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	FY2021-FY2025	PE	<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 Continue to implement recommendations from employment diversity report 	●	●	●	●	●
Targets ²⁹	Non-union Jobs	All Jobs																					
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²⁸ <http://trimet.org/equity/pdf/affirmative-action-plan.pdf>; note that targets are periodically updated based on latest availability figures


²⁹ 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		
30. Recruit a talented workforce	FY2020  94.7 percent average year to date acceptance to offer ratio  62.5 days average time to fill positions	<ul style="list-style-type: none"> Streamlined employment offer approval processes Adding recruitment by text message as another tool to reach out to various talent pools 		
	FY2021-FY2025 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 		

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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. Pursue professional growth for employees	 40 percent of identified key positions have “ready now” or “ready soon” candidates	<ul style="list-style-type: none"> ▪ Candidate readiness now at 40% for identified key positions due mainly to retirement and turnover ▪ Internal training and educational opportunities expanded ▪ Adding mandatory management training course to be completed soon after transfer or hire into a management position ▪ Developed and implemented formal internal mentor/mentee program across departments ▪ Internal training program improvements included: <ul style="list-style-type: none"> ○ Required classes expanded to address additional competencies ○ Graduates of internal Certificate in Management program are now eligible to receive credit toward their predicted compensation model 					
FY2020	MEASURE / TARGET	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
FY2021-FY2025	50 percent or more of key positions included in succession plans have candidates identified as “ready now” or “ready soon”	<ul style="list-style-type: none"> ▪ Improve ability for qualified internal candidates to move into management positions ▪ 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 ▪ Develop and implement a Certificate in Supervisory Skills program for front-line supervisors 	●	●	●	●	●

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People & Innovation Goal 3:
Foster Service Excellence and Innovation

OBJECTIVE	STATUS	RESULTS
32. Foster employee innovation, including process improvements and partnerships	FY2020 ↑ Multiple efforts underway in encouraging innovation especially in operational divisions	<ul style="list-style-type: none"> ▪ Multi-functional team that plans, schedules, and executes capital and service requirements of big projects has improved implementation and customer experience during projects ▪ Added cross-divisional coordination, especially with Finance and Engineering & Construction, is improving information sharing and minimizing delays to key efforts ▪ Agency-wide internal business process review underway with evaluation of opportunities for Lean-Six Sigma process improvement opportunities ▪ Internal innovation group meeting regularly and piloting survey to encourage innovation ▪ Developed broad range of procedures and documentation to enhance processes in Engineering & Construction ▪ Information Technology process improvements include development of Strategic Plan and implementation of a major projects management office ▪ Benefits department streamlined multiple processes and has increased availability for supporting staff questions and needs ▪ Implemented more cross-divisional meetings between Budget staff and budget stakeholders to ensure budget process reflects true needs

MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
FY2021-FY2025	PE PE SP	<ul style="list-style-type: none"> ▪ Advance efforts by internal group to encourage innovation and develop checklist of practices for each division to implement ▪ Develop long-term strategic approach for New Mobility opportunities ▪ Develop technology and partnership protocols to provide frictionless information, trip-planning, and access to mobility options ▪ Develop autonomous vehicle technology strategy, approaches, and partnership opportunities ▪ Continue strategic review of internal business processes in FY2021 and launch change management and implementation strategy in FY2022 	●	●	●		
			●	●			
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Financial

TriMet is a public agency. We have financial goals because it is important for public agencies to use available funding to provide service in a cost-effective and efficient way. The more careful we are with funding and expenditures, the more service we can provide and the more our community benefits.

Financial Goal 1: Fiscally Sound and Compliant

OBJECTIVE	STATUS	RESULTS															
33. Manage financial performance within Strategic Financial Plan guidelines	FY2020 All six Strategic Financial Plan ³⁰ guidelines met Net medical benefits cost per covered employee increased by 0.6 percent ³¹	Enterprise risk management registry developed <ul style="list-style-type: none"> All six Strategic Financial Plan guidelines were met for FY2020 Fully implemented capital prioritization process as part of budget development 															
	FY2021-FY2025 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 ³²	<ul style="list-style-type: none"> Actively manage and enhance financial performance and decision-making by aligning performance with the Strategic Financial Plan Achieve employee premium share percentages consistent with comparable jurisdictions through plan design changes for all employees, working collaboratively with the Union for plan design and other cost saving measures 	<table border="1"> <thead> <tr> <th>FY21</th> <th>FY22</th> <th>FY23</th> <th>FY24</th> <th>FY25</th> </tr> </thead> <tbody> <tr> <td>●</td> <td>●</td> <td>●</td> <td>●</td> <td>●</td> </tr> <tr> <td>●</td> <td>●</td> <td>●</td> <td>●</td> <td>●</td> </tr> </tbody> </table>	FY21	FY22	FY23	FY24	FY25	●	●	●	●	●	●	●	●	●
FY21	FY22	FY23	FY24	FY25													
●	●	●	●	●													
●	●	●	●	●													

DRAFT TRIMET BUSINESS PLAN FY2021 – FY2025

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³⁰ www.trimet.org/pdfs/sfp/14-07-37-Strategic-Financial-Plan-WEB.pdf

³¹ Fiscal year as of December 2019, compared to FY2018 average

³² www.bls.gov/ncs/ect/

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Financial Goal 2:
Manage Assets to Ensure Safety and Optimize Value, Performance, and Resiliency


OBJECTIVE	STATUS	RESULTS
34. Meet or exceed state of good repair targets for all identified asset classes	<div style="display: flex; align-items: center;"> <div style="background-color: #ffff00; width: 15px; height: 15px; margin-right: 5px;"></div> Enhancing processes and technology to enhance state of good repair cost-effectively with adjusted timeline to accommodate budget and staff availability </div>	<ul style="list-style-type: none"> ▪ Completed first year of regular condition assessments on critical and required assets ▪ Improving asset inventory data and organized staff to maintain asset inventory ▪ TAM Plan inventory and condition assessments on-target for completion for end of FY2020 ▪ State of good repair needs for assets included in annual budget prioritization process
	<div style="display: flex; align-items: center;"> <div style="background-color: #ffff00; width: 15px; height: 15px; margin-right: 5px;"></div> Many, but not all, asset classes meet or exceed targets </div>	

MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
All asset classes meeting or exceeding established targets in the short, medium, and long term, as defined in the Transit Asset Management Plan	SP	<ul style="list-style-type: none"> ▪ Develop and implement plans to repair, replace or otherwise remedy any asset classes not fully at target ▪ Replace Type 1 light rail vehicles ▪ Procure and implement Enterprise Asset Management System – technology improvements for asset inventory, condition assessment, maintenance, planning for replacement and management of TriMet assets 	●	●	●	●	●
	SP		●	●	●	●	
	SP		●	●			

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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											
35. Manage financial capacity to deliver regional expectations for service growth	FY2020  2.2 percent growth in bus service hours budgeted for FY2020	<ul style="list-style-type: none"> Managed budget and implemented service consistent with TriMet's Transit Improvement Plan as approved by HB2017 Advisory Committee³³ 											
	FY2021-FY2025 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 	<table border="1"> <thead> <tr> <th>FY21</th> <th>FY22</th> <th>FY23</th> <th>FY24</th> <th>FY25</th> </tr> </thead> <tbody> <tr> <td>●</td> <td>●</td> <td>●</td> <td>●</td> <td>●</td> </tr> </tbody> </table>	FY21	FY22	FY23	FY24	FY25	●	●	●	●	●
FY21	FY22	FY23	FY24	FY25									
●	●	●	●	●									

³³ <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
36. Maintain acceptable farebox recovery to optimize the balance of service demands, revenue, and cost	FY2020	<ul style="list-style-type: none"> Fixed-route farebox recovery rate at 21.0 percent³⁴ Bus Cost per vehicle hour increased 0.5 percent³⁵ MAX Cost per vehicle hour increased 5.2 percent WES Cost per vehicle hour decreased 2.7 percent LIFT Cost per vehicle hour increased 2.6 percent
	<ul style="list-style-type: none"> ▪ Capital budget prioritization process pilot completed; full program now implemented for annual budget decisions and ongoing project tracking and financial management ▪ Added presence on the system for customer safety and support and increased fare compliance ▪ Bus maintenance time standards reduced costs by over \$2 million annually 	

MEASURE / TARGET	Focus	KEY STRATEGIC ACTIONS	FY21	FY22	FY23	FY24	FY25
FY2021-FY2025	SP	<ul style="list-style-type: none"> ▪ Complete outreach regarding increase in fares for potential adoption for FY2022 Budget ▪ Develop and implement strategies to increase fare compliance ▪ Improve inventory accuracy and completeness and develop well-documented preventive maintenance procedures for facilities ▪ Ensure market-competitive labor costs ▪ Review structural long-term state of good repair requirements and impact on cost per hour 		●			
		<ul style="list-style-type: none"> 25 percent or greater farebox recovery (passenger revenue/ operations cost) for fixed route Annual increase in operations cost per vehicle hour (bus, MAX, WES, LIFT/CAB) less than or equal to targeted budget amount 	●	●	●	●	●

SP = Directly addresses a Strategic Priority

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

³⁴ Passenger revenue/ system cost 12-month average as of November 2019
³⁵ All measures for this Objective are 12-month average year-over-year as of November 2019

The Route Ahead

The Strategic Business Plan is a dynamic document because it has to be. Circumstances have changed and we've made progress. 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 uses the Goals, Objectives, Measures, Targets, and Key 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 allow us to take on the future with a solid route map while retaining the flexibility to respond when things change.

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

- The continuing roll-out of service using HB2017 funding, including development of our new bus garage on NE Columbia Blvd
- The urgency of carbon reduction, including expanding our battery electric bus fleet in keeping with TriMet's Non-Diesel Bus Plan
- Division Transit Project
- The challenge of regional growth, congestion, and advances in technology

We continue to 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 either 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., major storm or 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

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 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., FY2021 is from July 1, 2020, through June 30, 2021

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; 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

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

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

PCM - Predicted Compensation Model – The model yields 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

PE – Point of Emphasis – Activities and issues that TriMet will emphasize for FY2021 in both the Business Plan and Budget

Premises – Basic assumptions underlying the projections, analyses, plans, strategies, and approaches

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

Pulse Survey – Periodic survey of a 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

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

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

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

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

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

SP – Strategic Priorities – Priorities for roughly a 5-15 year horizon that are intended to guide this and future Business Plans and Budgets

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

TAM Plan - 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.

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)

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

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