

The background of the cover is a photograph of a large, curved sign. The sign features a prominent logo consisting of three interlocking, stylized shapes in red and white. The sign is set against a bright blue sky filled with white, fluffy clouds. The sign's surface is glossy, reflecting the sky and clouds. The overall composition is dynamic, with the curve of the sign leading the eye across the frame.

**TriMet Business Plan**  
for Fiscal Years 2019-2023

**Final**  
June 2018

# 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 49-year drive to strengthen 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 begin service on December 1.

**1973** TriMet identifies strategies to increase bus ridership by 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 specific requirements by the Americans with Disabilities Act of 1990.

**1980** **Frequent Service** with bus lines running every 15-minutes or less is introduced to Portland’s inner eastside.

**1986** The eastside **Banfield Light Rail Project** begins service as **MAX**.

**1998** **Westside MAX Blue Line** introduces **low-floor, easy-entry light rail cars** to North America.

**2001** **Airport MAX Red Line** (the West Coast’s first train to plane) and the modern **Portland Streetcar** opens.

**2004** **Interstate MAX Yellow Line** opens ahead of schedule with improvements to connecting bus service.

**TransitTracker™** - one of the first real-time arrival information systems in the nation - starts.

**2005** TriMet and Google develop the **GTFS (General Transit Feed Specification)**, which is now a worldwide standard for transit apps. TriMet becomes the first transit system on Google Transit.

**2009** **I-205/Portland Mall MAX Green Line** to Clackamas Town Center and PSU opens on time, upgrading the Portland Mall and adding light rail service north-south in downtown Portland.

TriMet opens **WES (Westside Express Service) Commuter Rail**, a 14.7 mile, suburb-to-suburb commuter rail line with service between Beaverton and Wilsonville.

TriMet develops **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**, under budget and on time.

TriMet opens **Tilikum Crossing, Bridge of the People**, the first multi-modal bridge of its kind in the U.S. that does not allow private vehicles of any kind. 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 for **Hop Fastpass™**

**Hop is here!**



[myhopcard.com](http://myhopcard.com)

# Letter from the General Manager



It is a pleasure to present our strategic Business Plan for FY2019 through FY2023. The Plan lays out goals and objectives and how to achieve them by being strategic, maintaining what we have, and being smart about how we grow. Though internally focused, it is designed to help us address the needs of our customers and community.

This year, we present our first annual review of the past year's efforts. As you will see, we have coded each measure based on whether we met the target for FY2018. One effort we've focused on is improving our on-time performance so that you can have more confidence in when your train or bus will arrive and how long it will take to get where you're going. I'm very pleased to say that our on-time performance has really improved – at the *same time* that our operating safety statistics have improved.

Though I'm happy to say we've made progress, there is still so much to do. In those cases where we've missed targets, we have taken a deeper look at our Key Strategic Actions to meet those expectations. Throughout all our efforts, we must continue to foster a culture of safety and strive to provide service where all of our riders feel safe and secure.

We know there are many people who rely on our service every day and need even more service to meet their daily needs. This past year, the State of Oregon passed House Bill 2017 (HB2017) to provide more funding for transit. That funding begins in FY2019. With this new funding, we are introducing a Low-Income Fare for eligible adult riders. In addition, we will work with the HB2017 advisory committee on recommendations to provide additional services and investments in areas with many low-income households. With each year, we plan to introduce more service, especially on bus routes with high ridership potential. This will allow us to make big strides toward making the 20-year vision of improved service a reality—a vision we developed with the community in our Service Enhancement Plans ([www.trimet.org/future](http://www.trimet.org/future)).

We still face the big challenges introduced in last year's Plan. Our aging infrastructure needs constant vigilance and yet, we also must meet the needs of our region's growth. Some projects will do both. One of our bus garages, built in the early 1980s as a "temporary" facility, has outlived its usefulness. Before the end of calendar year 2018, we will start construction on a replacement facility providing more capacity for our growing fleet and for new 60-foot-long "articulated" buses for the Division Transit Project.

In 2019, TriMet turns 50! Back in 1969, a group of leaders from the Portland region went to Salem and asked for help to ensure the mobility and economic vitality of the region by creating a public transit agency. Almost 50 years later, TriMet proudly continues that legacy. We look forward to building the next 50 years and doing our part to make this the best place to live in the country. And each year, we will revisit and update the Plan to find better ways to serve our valued customers and the many communities of this region.

A handwritten signature in blue ink, appearing to read "Doug Kelsey". The signature is fluid and stylized, with a long horizontal stroke at the end.

Doug Kelsey  
General Manager



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# Introduction

## Why a Business Plan?

As a transit agency grows, it doesn't simply get bigger; it matures and becomes more complex. And as TriMet continues to grow, we are no longer a young system, but a system that must simultaneously maintain its current infrastructure and still be able to expand. Our workforce is also changing as the next generation expands our ranks, and new technology and innovation presents opportunities and challenges. Now is the time to more closely coordinate our efforts within the agency and pursue priorities in a comprehensive, agency-wide manner.

## Drive and Measure Progress

In developing a Business Plan, our aim was to build upon work done to date while drawing together a greater range of factors to clearly define agency-level Goals, Objectives, Measures, Targets, and the Strategic Actions designed to achieve them. The results:

- Capture agency goals and integrate objectives in one place
- Incorporate trends, challenges, and new opportunities
- Align external growth with internal performance
- Develop and enhance internal communication through a cohesive, prioritized plan of action
- Focus resources on future needed outcomes

This year is the first year we've been able to report on our progress toward targets. We inserted simple icons to give a sense at-a-glance, with additional description of results and achievements toward each Objective.

## Rolling Five-year Plan

This Business Plan covers Fiscal Years FY2019 through FY2023 and will be updated annually with a rolling five-year horizon. The Business Plan and its strategic priorities will inform both the operating and capital budgets each year and vice-versa. Of course, TriMet's financial forecasts and some individual strategies have longer horizons to ensure that the five-year primary focus does not miss longer-term trends.

## What Has Changed for FY2019

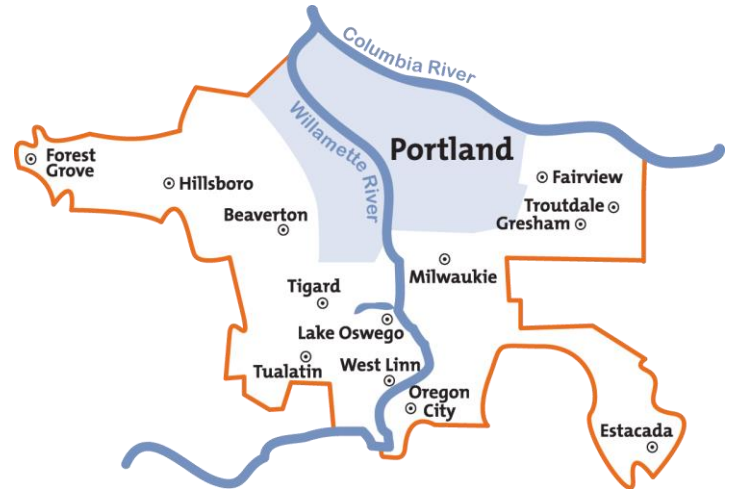
We've updated our Strengths, Weaknesses, Opportunities, and Constraints to reflect changing conditions in the last year. We also added information on what TriMet accomplished during FY2018 and updated our Key Strategic Actions for FY2019-FY2023. This Plan remains guided by the Strategy Map and the structure we created last year, but is a renewed look forward.

## Serving the Community with this Plan

This Business Plan gives TriMet staff and leadership a coordinated strategy for success as an agency. The goals and objectives are informed by our ongoing efforts to understand the needs and desires of our riders as well as the broader community. The actions presented in the Business Plan do not take the place of meaningful public engagement. We will continue to engage the diverse communities we serve as we implement and update this Plan because they are the ultimate reason we strive for success.

## About Us

- **Transit district created by Oregon law** serving over 1.5 million people in a 533-square-mile area
- **Primarily funded through an employer payroll tax and self-employment tax.** The state recently added an employee payroll tax of one tenth of one percent, going into effect July 1, 2018. Fare revenues and some federal, state and local grants round out our budget
- **Governed by a seven-member board of directors,** who each represent a geographical district where they must reside



## Our Customers

### Riders:

- **Take almost 100 million rides** on TriMet each year—adults, youth, seniors, and persons with disabilities
- **Comprise 76 percent** of the region's adults
- **80 percent could drive** but instead choose TriMet
- Ride for **many different purposes** including work, school, medical appointments, shopping, going to special events or the airport, visiting friends, etc.

### Regional communities benefit from:

- **Investing in our region's transit and roads,** which will reduce projected congestion by half over the next 25 years
- **Generating nearly \$1.1 billion in economic benefits,** a return of \$2.40 for every \$1 spent
- MAX helping spur **more than \$20 billion in development value** within walking distance of MAX stations
- **Supporting mobility for residents** for work, education, medical visits, and other daily needs

### Regional residents:

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

### Regional businesses benefit, too:

- **Employers**—over 1,300 worksites offer employee transit benefits, reducing the need to provide expensive parking
- **Retail and recreation**—more than half of our riders use transit for shopping and/or recreation
- **Freight**—addressing congestion means freight can move more freely on our roads and highways, saving more than \$150 million per year
- **Colleges and universities**—44 percent of Portland State University students, faculty, and visitors take transit to campus
- **Part of the region's competitive livability** for talent in the global environment



## Our Services

### Buses

- Serve most of the metro area and connect with MAX, WES, and Portland Streetcar
- 83 bus lines, including 12 Frequent Service lines
- Ridership: Nearly 58 million trips (FY2017)

### WES Commuter Rail

- Serves Beaverton, Tigard, Tualatin, and Wilsonville with weekday rush-hour service
- Five stations and 14.7 miles of track
- Ridership: 448,000 trips (FY2017)

### MAX Light Rail

- Connects Beaverton, Clackamas, Gresham, Hillsboro, Milwaukie, Portland, and Portland International Airport
- Five MAX lines stretching over 60 miles
- Ridership: over 39 million trips (FY2017)

### LIFT Paratransit Service

- Provides door-to-door service for people with disabilities who are unable to ride TriMet's regular buses or trains
- 253 LIFT buses and 15 LIFT vans
- Ridership: One million trips (FY2017)

### Mobility Information for Travelers

- **Multi-modal trip planner** including rail, bus, bike, walking and combined options: [ride.trimet.org](http://ride.trimet.org)
- **Riders Support:** 503-238-RIDE(7433); 1-844-MyHopCard(694-6722); [hello@trimet.org](mailto: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](http://trimet.org) or by text: send stop ID # to 27299
- **Service alerts:** [trimet.org/alerts](http://trimet.org/alerts) and [@trimetalerts](https://twitter.com/trimetalerts)
- **Social media accounts:** [Facebook.com/trimet](https://facebook.com/trimet); [@trimet](https://twitter.com/trimet); [@ridetrimet](https://instagram.com/ridetrimet)

## TriMet's Primary Roles in the Region

Doing our part means providing service and capital projects that:

- **Support our economy:** Get employees to work and customers to businesses
- **Ease congestion:** Attract many riders during peak periods and provide the kinds of service and capital projects that lead to development and lifestyles that rely less on peak-period driving
- **Provide mobility for those with few options:** Provide a critical service for seniors, people with disabilities, school kids, low-income households without cars and others who have few mobility options by getting them to work, school and other destinations by transit
- **Help shape the future of our region:** Deliver service and capital projects that help attract residents, businesses, and development to centers, main streets, and corridors that communities have identified as future growth areas
- **Reduce emissions and support environmental sustainability:** Operate service and support development that provides options other than driving, thereby reducing resource use, greenhouse gases and emissions in neighborhoods

# Strengths, Weaknesses, Opportunities, and Challenges

Each year, we will refresh our understanding of our internal 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.

## Internal

### Strengths

- Safety is a core value at TriMet
- Mission-driven work
- HB2017 new funding from state
- Strong revenue base for the Plan period
- Overall positive public support of TriMet
- Proven ability to expand
- Regional thought leader and influencer
- Accessible, open data with good supporting information technology infrastructure
- New union contract
- Demonstrated effective capital planning process
- New ridership pattern information from Hop Fastpass™
- Support from Congressional delegation and state leadership
- First Special Tax Revenue Bond to receive highest ratings from both Moody's (Aaa) and S&P (AAA)
- Demonstrated desire to work across departments and divisions
- Significantly improved average age of bus fleet
- Good Hop Fastpass™ adoption rate and introduction of virtual pay

### Weaknesses

- Many competing needs for capital and operating resources
- Retirements leading to loss of institutional knowledge
- Aging infrastructure
- Workload, expectations, and staff capacity not consistently well matched
- Have not yet achieved a culture of safety
- Administration, maintenance and parking space is near capacity
- Physical separation of administration employees and operations employees hinders communication and teamwork
- Incomplete and inconsistent internal understanding of what it means to provide excellent customer service
- Dispersed and not fully coordinated data collection, management, and document sharing
- Insufficient systems for prioritizing and delivering high volume of timely small capital projects
- Training needs at all levels
- Unsettled relationship with union leadership
- Incomplete employee understanding of leadership decisions
- Incomplete internal resources for communicating with our riders and communities with limited English proficiency
- Lack of communication about career advancement opportunities within TriMet
- Capital asset conditions not fully assessed
- Incomplete succession planning/technical capacity

## Opportunities

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

## Challenges

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

# Premises

## Agency

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

## Requirements

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

## Cost Effectiveness

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

## Growth

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

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

## Service

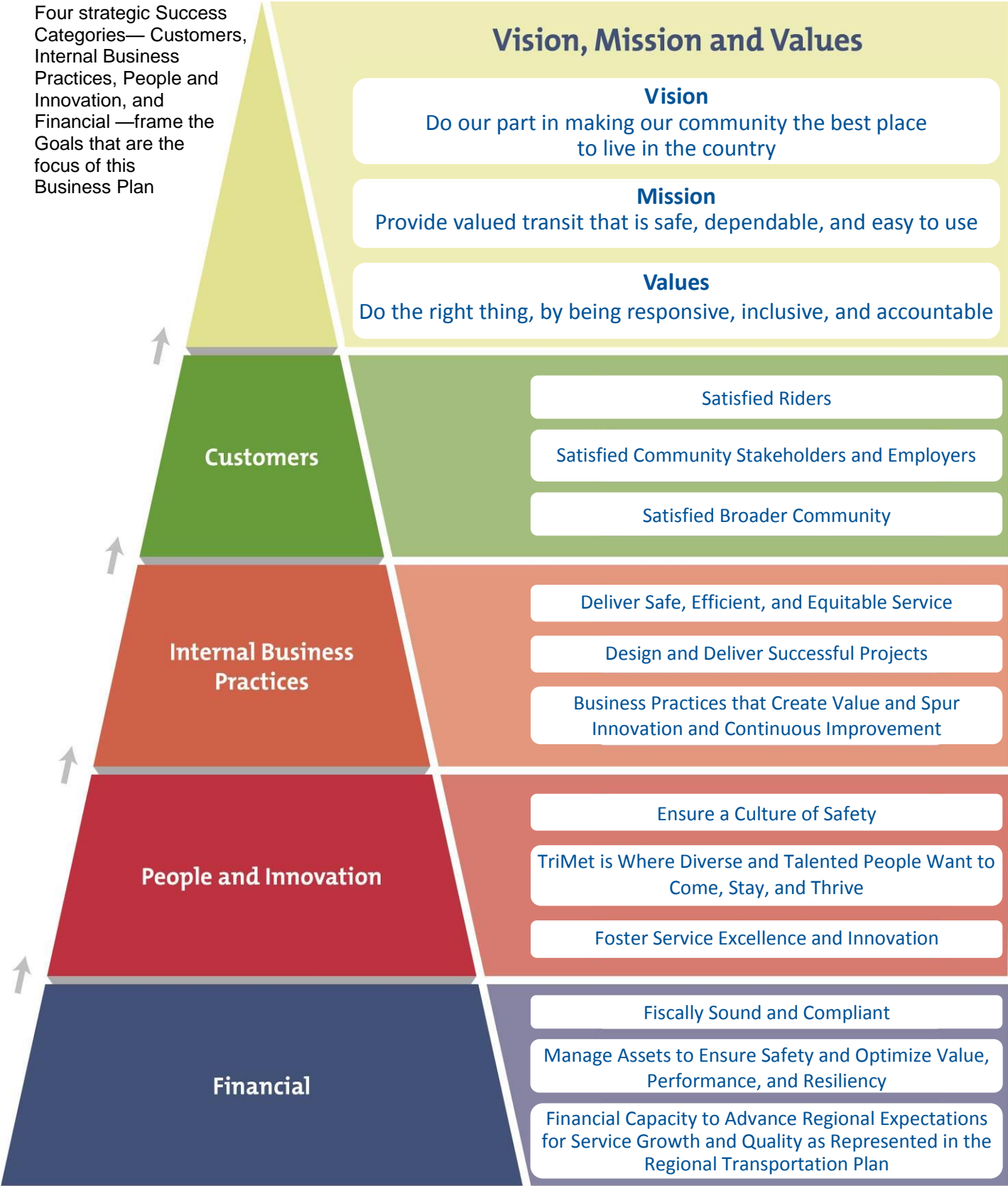
- Service will grow and respond to changing demographics in various communities in the region
- TriMet continues to focus on its vital culture of safety as well as on-time performance for rail and bus

## Vehicle Technology

- Fleet mix – TriMet continues to operate mostly 40-foot buses. TriMet will add articulated buses for the Division Transit Project and will consider articulated buses for other lines
- Electrification – TriMet is procuring five grant-funded, fully-electric battery-powered buses for a pilot, to inform a strategy about how and when to shift toward clean fuel buses as performance and cost allow
- Autonomous vehicle (AV) technology offers some opportunities and potential challenges which require more exploration

# Strategy Map

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



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

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

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

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

This year we have added icons showing our status and a description of results.


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






## Customers Goals


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

### CUSTOMERS GOAL 1: Satisfied Riders

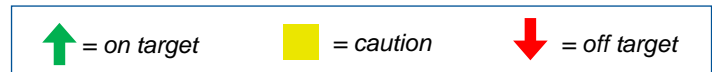
OBJECTIVE		STATUS	RESULTS
1. Provide safe service	FY2018	 Strategy development underway but not complete	<ul style="list-style-type: none"> <li>Completed customer service audit including passenger safety. Now benchmarking against other transit agencies to inform future improvements</li> <li>Created inclusion and safety information campaigns for rollout in May 2018</li> <li>Security presence on system increased during FY2018</li> </ul>
		FY2019 - FY2023	MEASURE / TARGET
Strategy development stage complete and strategy implemented: FY2019	<ul style="list-style-type: none"> <li>Formulate strategy to implement results from customer experience audits to improve safety and security practices. Identify best practices. Identify locations and times with higher needs. Develop plan and implement strategy to advance continuous improvement</li> </ul>		
Hours of safety and customer service presence on the system per 1,000 hours of operation: target under development	<ul style="list-style-type: none"> <li>Increase engagement with community groups and riders to meet safety needs on board and at TriMet facilities</li> <li>Establish public safety and security advisory committee</li> <li>Rider safety:                             <ul style="list-style-type: none"> <li>Provide additional presence on the system</li> <li>Develop and deliver a new rider training program to address perceptions and reduce barriers</li> <li>Enhance information on website and other external information channels</li> <li>Enhance tracking of security presence on system</li> </ul> </li> <li>Non-rider safety: Develop and disseminate an external security dashboard</li> <li>Utilize market segmentation and other analytics to provide deeper information on what shapes perceptions</li> <li>Implement eighth camera with audio in buses during FY2019</li> </ul>		

 = on target     
  = caution     
  = off target

## CUSTOMERS GOAL 1: Satisfied Riders


OBJECTIVE	STATUS	RESULTS				
2. Increase ridership	 Ridership was down 2.0 percent <sup>1</sup>	<ul style="list-style-type: none"> <li>Bus service increased 3.4 percent during FY2018</li> <li>Engaged public on service plans through public meetings, open houses, engagement with under-represented communities and with support for multiple languages (such as Spanish, Russian, Chinese, Swahili/Somali, and Korean), and online surveys (over 5,600 respondents) with more meetings and public workshops scheduled</li> <li>Community/Job Connector program being developed as part of HB2017 planning process to help address first- and last-mile connection needs</li> <li>Completed research on ridership trends and root causes and presented to Board</li> <li>Engaging City of Portland in regional Enhanced Transit Concept process to improve bus operations to reduce travel times and minimize delays to bus riders</li> <li>See multiple other objectives including 3, 4, 7, 15, 16, and 20 for actions designed to positively impact ridership in the long-run</li> <li>Increased distribution of new resident kits – sent over 2500 kits to new developments from July 2017 to May 2018</li> <li>Developed plan for more outreach regarding Hop Fastpass™ for Latinx and Asian communities</li> </ul>				
	<table border="1"> <thead> <tr> <th>MEASURE / TARGET</th> <th>KEY STRATEGIC ACTIONS</th> </tr> </thead> <tbody> <tr> <td>Stabilized then increased boardings: FY2019</td> <td rowspan="2"> <ul style="list-style-type: none"> <li>Develop strategies to increase ridership compared to regional growth, including:                             <ul style="list-style-type: none"> <li>Target service enhancements in locations that will address changing demands</li> <li>Market segmentation for service and customer information/marketing</li> <li>Personalized marketing programs (e.g., new resident information or tourist-focused automated tours)</li> <li>Increase employer fare program participation</li> <li>Broaden multicultural marketing strategies</li> <li>Strengthen promotion of off-peak ridership</li> </ul> </li> <li>Develop enhanced first- and last-mile strategies for coordination with other transportation options</li> <li>Coordinate safety and security with customer service strategies to enhance sense of security and increase ridership</li> <li>Enhance high-demand service with HB2017 funding that will result in significant ridership increases</li> <li>Implement strategy for TriMet's support of Transit-Oriented Development equitable housing and for value capture that supports higher transit demand around existing MAX, DTP, and Frequent Service</li> </ul> </td> </tr> <tr> <td>2 percent annual percentage increase in boardings for bus and MAX: FY2022</td> </tr> </tbody> </table>	MEASURE / TARGET	KEY STRATEGIC ACTIONS	Stabilized then increased boardings: FY2019	<ul style="list-style-type: none"> <li>Develop strategies to increase ridership compared to regional growth, including:                             <ul style="list-style-type: none"> <li>Target service enhancements in locations that will address changing demands</li> <li>Market segmentation for service and customer information/marketing</li> <li>Personalized marketing programs (e.g., new resident information or tourist-focused automated tours)</li> <li>Increase employer fare program participation</li> <li>Broaden multicultural marketing strategies</li> <li>Strengthen promotion of off-peak ridership</li> </ul> </li> <li>Develop enhanced first- and last-mile strategies for coordination with other transportation options</li> <li>Coordinate safety and security with customer service strategies to enhance sense of security and increase ridership</li> <li>Enhance high-demand service with HB2017 funding that will result in significant ridership increases</li> <li>Implement strategy for TriMet's support of Transit-Oriented Development equitable housing and for value capture that supports higher transit demand around existing MAX, DTP, and Frequent Service</li> </ul>	2 percent annual percentage increase in boardings for bus and MAX: FY2022
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2 percent annual percentage increase in boardings for bus and MAX: FY2022						

<sup>1</sup> Average weekly boardings as of May 2018 compared to one year previous








## CUSTOMERS GOAL 1: Satisfied Riders

OBJECTIVE	STATUS	RESULTS
3. Improve overall customer experience	 Data collection phase complete before end of FY2018, but program still in development	<ul style="list-style-type: none"> <li>Expanded customer information support including seven day per week phone support and social media support including @TriMetHelp and @HopHelp. Texting support expected to be complete by July 2018</li> <li>Completed customer experience audit which generated improved understanding of customer expectations and priorities through customer service quality assurance survey and rider data collection</li> <li>Began benchmarking customer experience efforts by peer transit agencies</li> </ul>




	MEASURE / TARGET	KEY STRATEGIC ACTIONS
FY2019 - FY2023	Set of measures related to customer experience developed: FY2019, then measure progress against new measure in future years	<ul style="list-style-type: none"> <li>Develop and implement program and strategy for enhancing customer service provided by employees and contractors based on customer experience; included evaluations of resource use in vehicle and system cleaning, on-time performance and other customer experience enhancements</li> </ul>
	Hours on system for transit officers and security personnel: Set target with advisory committee during FY2019 for future years	<ul style="list-style-type: none"> <li>Establish public safety and security advisory committee and establish appropriate safety and security benchmarks</li> <li>Increase visibility and frequency of customer service personnel on the system</li> </ul>
	2.8 or fewer <sup>2</sup> customer complaints about personal safety and security per 100,000 boardings	<ul style="list-style-type: none"> <li>Incorporate community feedback into safety and security strategies</li> <li>Expand customer information through technologies that support chat function</li> </ul>

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<sup>2</sup> Tracking on this measure started recently; target may be adjusted based on near-term performance

## CUSTOMERS GOAL 1: Satisfied Riders


OBJECTIVE	STATUS	RESULTS
<b>4. Ensure equitable distribution of services and resources across the TriMet system</b>	<b>FY2018</b> <ul style="list-style-type: none"> <li>↑ Revenue hours provided</li> <li>↑ Vehicle loads</li> <li>↑ On time performance</li> <li>↑ Service availability</li> <li>↓ Vehicle assignment – Bus</li> <li>↑ Vehicle assignment – MAX</li> <li><i>Stop amenities:</i></li> <li>↑ Seating</li> <li>■ Lighting</li> <li>↑ Elevators</li> <li>↑ Digital displays</li> <li>↑ Shelters</li> <li>↑ Signs, maps and/or schedules</li> <li>↑ Waste receptacles</li> </ul>	<ul style="list-style-type: none"> <li>▪ All minority and/or low-income lines are better, equal to, or within 5 percent of non-minority and/or non-low-income lines on all measures except:               <ul style="list-style-type: none"> <li>○ Vehicle assignment of buses (within 20 percent but not 10 percent). : The average age of buses on minority and on low-income lines was about 12 percent and 13 percent older (respectively) than buses on non-minority and non-low-income lines</li> <li>○ Lighting (within 10 percent but not within 5 percent)</li> </ul> </li> <li>▪ Engaged community through open houses and public meetings throughout the region regarding service, budget, and planning for use of HB2017 funds, including outreach to under-represented communities and providing meetings in multiple languages</li> <li>▪ Secured state legislation to allow and then implemented a 90-day window to resolve citations for people who don't pay a fare before sending them to court, either through a fine or community service. This will keep many people out of the judicial system</li> </ul>
	<b>FY2019 - FY2023</b> Minority and low-income access within 5 percent or better than non-minority and non-low income access <sup>3</sup> across different measures: <ul style="list-style-type: none"> <li>▪ Revenue hours provided</li> <li>▪ Vehicle loads</li> <li>▪ On time performance</li> <li>▪ Service availability</li> <li>▪ Vehicle assignment</li> <li>▪ Stop amenities</li> </ul>	<b>KEY STRATEGIC ACTIONS</b> <ul style="list-style-type: none"> <li>▪ Conduct annual review of resource distribution and implement needed service or amenity adjustments to reach equity targets</li> <li>▪ 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</li> <li>▪ Working with the HB2017 advisory committee, develop recommendations for the TriMet board that:               <ol style="list-style-type: none"> <li>1) define 'high concentrations of low income households';</li> <li>2) provide additional services and investments in areas of the district with high concentrations of low income households; and</li> <li>3) prepare and submit annual reports to the Oregon Department of Transportation (ODOT) on the services and other investments in these areas</li> </ol> </li> <li>▪ Deliver all Board objectives for General Manager<sup>4</sup></li> <li>▪ In FY2019, develop and implement plan to address equity of vehicle assignments</li> </ul>

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<sup>3</sup> See especially pages 61-62 at [www.trimet.org/about/pdf/2016-title-vi.pdf](http://www.trimet.org/about/pdf/2016-title-vi.pdf)




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

## CUSTOMERS GOAL 1: Satisfied Riders


OBJECTIVE	STATUS	RESULTS
<b>5. Improve customer information and services</b>	 Developed process for Customer Information Strategy	<ul style="list-style-type: none"> <li>▪ Customer information strategy launched and implemented new customer information channel @TriMetAlerts to streamline communication to riders on service disruptions</li> <li>▪ Added staff to improve communication on bus and rail delays in real-time</li> <li>▪ Launched Hop Fastpass™</li> <li>▪ Distributing 20,000 additional Hop Fastpass™ cards at no cost to riders</li> <li>▪ Worked with City of Portland to define technology integration approach to allow access to BIKETOWN account with Hop Fastpass™ card</li> <li>▪ In discussions with partners to add customer value to Hop Fastpass™ experience</li> <li>▪ On-schedule with foundational open-source information technology development to improve customer information regarding trip planning and provide more mobility options for each trip</li> </ul>
	MEASURE / TARGET Customer information strategy completed; implementation underway: FY2019	KEY STRATEGIC ACTIONS <ul style="list-style-type: none"> <li>▪ Implement enhanced information to customers through technology advances and communications strategies:               <ul style="list-style-type: none"> <li>○ Develop strategy, technologies, tools, and techniques to provide customized and targeted real-time service information to improve customer communications and minimize imprecise, global service messages</li> <li>○ Deliver multi-year project to overhaul our existing digital information displays and introduce new and expanded digital components during FY2021–FY2023</li> </ul> </li> <li>▪ Engage and educate about customer access to Hop Fastpass™</li> <li>▪ Develop enhanced Hop Fastpass™ customer value strategy, including potential mobility management opportunities that extend beyond directly provided service</li> <li>▪ Develop technology and partnership protocols to provide frictionless information, trip-planning and travel for customers</li> <li>▪ Test and develop new and innovative customer products and services</li> </ul>




FY2018

FY2019 - FY2023

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## CUSTOMERS GOAL 1: Satisfied Riders

OBJECTIVE	STATUS	RESULTS
<b>6. Achieve market acceptance of Hop Fastpass™ as a fare instrument</b>	<b>FY2018</b>  17.5 percent <sup>5</sup> of fares collected through Hop Fastpass™	<ul style="list-style-type: none"> <li>▪ Hop Fastpass™ successfully launched with growing use month-over-month</li> <li>▪ Over 100,000 active cards for Hop Fastpass™ by May 2018</li> <li>▪ Developed and released virtual card currently in beta testing</li> </ul>
	<b>FY2019 - FY2023</b> <b>MEASURE / TARGET</b> 35 percent of fare revenue from Hop: by end of FY2019 (75 percent by end of FY2022) 250,000 Hop users: by end of FY2022 <sup>6</sup>	<b>KEY STRATEGIC ACTIONS</b> <ul style="list-style-type: none"> <li>▪ Implement Hop Fastpass™ roll-out plan and deliver key milestones on time</li> <li>▪ Migrate annual, universal, and monthly passes to Hop during FY2020</li> <li>▪ Further integrate Hop Fastpass™ for uses such as Low-Income Fare, LIFT rides and Bike &amp; Ride secure bike parking facility access</li> </ul>




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<sup>5</sup> As of May 2018


<sup>6</sup> Measure and Target under review and may be updated based on use patterns during FY2019

## CUSTOMERS GOAL 2: Satisfied Community Stakeholders and Employers

OBJECTIVE	STATUS	RESULTS
<b>7. Help shape the future of cities and our region in line with Metro 2040 Growth Concept</b>	<p><i>Access to housing and employment measures:</i></p> <ul style="list-style-type: none"> <li>↑ Housing near MAX (up 0.4 percent to 13.7 percent)</li> <li>■ Housing near Division Transit Project (down 0.1 percent to 3.9 percent)</li> <li>↑ Housing near Frequent Service Bus (up 0.2 percent to 27.4 percent)</li> <li>↑ Housing near all transit (up 3.4 percent to 89.5 percent)</li> <li>↑ Employment near MAX (up 0.8 percent to 27.8 percent)</li> <li>↑ Employment near Division Transit Project (up 0.1 percent to 1.7 percent)</li> <li>■ Employment near Frequent Service bus (down 0.1 percent to 23.1 percent)</li> <li>↑ Employment near all transit (up 2.0 percent to 95.0 percent)</li> </ul>	<ul style="list-style-type: none"> <li>▪ TriMet-owned land opportunities yielded five projects with partners:               <ul style="list-style-type: none"> <li>○ Three projects where TriMet sold land or is in negotiations to sell to a non-profit developer who will construct affordable housing adjacent to transit. Together, those projects are expected to provide nearly 500 affordable units with TriMet contributing by either discounting the price directly (within FTA constraints) or with likely savings by providing land through direct sale to a non-profit rather than a market-wide sales process</li> <li>○ Two value capture projects still in negotiations (see Objective 27)</li> </ul> </li> <li>▪ With partners and lead from Metro, supporting equitable development in Southwest Corridor</li> <li>▪ Housing and employment development continues to occur around light rail and Frequent Service bus consistent with regional and local development strategies</li> <li>▪ Added new bus line coverage, bringing more housing and jobs close to transit</li> </ul>
<b>FY2019 - FY2023</b>	<p><b>MEASURE / TARGET</b></p> <p>Percentage and/or volume of housing development and employment within walking distance of MAX, Division Transit Project, and Frequent Service bus greater than or equal to previous year</p>	<p><b>KEY STRATEGIC ACTIONS</b></p> <ul style="list-style-type: none"> <li>▪ Implement strategy for TriMet's support of Transit-Oriented Development equitable housing and for value capture that supports transit around MAX, Division Transit Project, and Frequent Service bus, including management of real property and underutilized Park &amp; Ride lots</li> </ul>




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## CUSTOMERS GOAL 2: Satisfied Community Stakeholders and Employers



OBJECTIVE	STATUS	RESULTS
<b>8. Ease congestion by providing attractive travel options during peak periods</b>	FY2018  29.6 percent <sup>7</sup> of travelers in Banfield and Sunset corridors during peak hour in peak direction rode MAX (down from 29.8 percent)	<ul style="list-style-type: none"> <li>Total peak hour, peak direction travelers in Banfield and Sunset corridors on MAX grew compared to previous count, as did estimated total people in cars at the same points</li> <li>Red Line project further defined through public review and design refinement. Project Development to begin in FY2019</li> <li>Engaged community regarding Red Line Extension and Reliability Project through community meetings (four past; two more expected in FY2018), one-on-one conversations with nearby community members, and online information</li> <li>Added peak hour bus service on multiple lines</li> </ul>
	FY2019 - FY2023 <b>MEASURE / TARGET</b> 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 <sup>8</sup>	<b>KEY STRATEGIC ACTIONS</b> <ul style="list-style-type: none"> <li>Pursue Red Line extension to Fairplex and MAX system improvements to Gateway and Airport tracks through Small Starts or other federal program</li> <li>Introduce higher capacity articulated buses into service when and where appropriate during the next five years</li> </ul>

<sup>7</sup> Data comparing Oregon Department of Transportation traffic counts with TriMet peak MAX ridership, both in Fall 2017

<sup>8</sup> Measure under review and may be changed in future reports

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## CUSTOMERS GOAL 2: Satisfied Community Stakeholders and Employers

OBJECTIVE	STATUS	RESULTS					
<b>9. Support the region's economy by expanding employee access to jobs and customer access to businesses</b>	<b>FY2018</b>  95.0 percent of employment within walking distance of transit (up from 93.1 percent)  97.7 percent of retail within walking distance of transit (up from 96.8 percent)	<ul style="list-style-type: none"> <li>Provide regional coordination for HB2017-funded, non-TriMet services as required under state law</li> <li>Complete final HB2017 plan before end of calendar year 2018 to meet state deadline</li> <li>Developed Low-Income Fare<sup>9</sup> program through Hop Fastpass™ to be paid for with new state funding from HB2017</li> <li>Supported additional development near MAX stations (see Objectives 7 and 27)</li> <li>Engaging City of Portland in regional Enhanced Transit Concept process to improve bus operations and encourage additional development along frequent transit lines</li> </ul>					
	<b>FY2019 - FY2023</b> <table border="1"> <thead> <tr> <th data-bbox="489 646 848 698">MEASURE / TARGET</th> <th data-bbox="848 646 1961 698">KEY STRATEGIC ACTIONS</th> </tr> </thead> <tbody> <tr> <td data-bbox="489 698 848 836">Percent of employment accessible by transit equal to or greater than previous year</td> <td data-bbox="848 698 1961 836"> <ul style="list-style-type: none"> <li>If supported by HB2017 public advisory committee, seek approval from region and state to facilitate development of non-TriMet shuttle program as part of HB2017 planning process to help address first- and last-mile needs</li> <li>Implement Low-Income Fare program and expand use</li> </ul> </td> </tr> <tr> <td data-bbox="489 836 848 1039">Percent of retail accessible by transit equal to or greater than previous year</td> <td data-bbox="848 836 1961 1039"> <ul style="list-style-type: none"> <li>Develop strategy for partnership to provide mobility in low-productivity, lower-demand areas and times of day when demand is not high enough to provide cost-effective TriMet fixed-route service. Assess feasibility and, if promising, develop and implement pilot partnership for non-TriMet program during FY2020</li> <li>Develop steps during FY2019-FY2020 with partners to implement future pilot using autonomous vehicle technology</li> </ul> </td> </tr> </tbody> </table>	MEASURE / TARGET	KEY STRATEGIC ACTIONS	Percent of employment accessible by transit equal to or greater than previous year	<ul style="list-style-type: none"> <li>If supported by HB2017 public advisory committee, seek approval from region and state to facilitate development of non-TriMet shuttle program as part of HB2017 planning process to help address first- and last-mile needs</li> <li>Implement Low-Income Fare program and expand use</li> </ul>	Percent of retail accessible by transit equal to or greater than previous year	<ul style="list-style-type: none"> <li>Develop strategy for partnership to provide mobility in low-productivity, lower-demand areas and times of day when demand is not high enough to provide cost-effective TriMet fixed-route service. Assess feasibility and, if promising, develop and implement pilot partnership for non-TriMet program during FY2020</li> <li>Develop steps during FY2019-FY2020 with partners to implement future pilot using autonomous vehicle technology</li> </ul>
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Percent of retail accessible by transit equal to or greater than previous year	<ul style="list-style-type: none"> <li>Develop strategy for partnership to provide mobility in low-productivity, lower-demand areas and times of day when demand is not high enough to provide cost-effective TriMet fixed-route service. Assess feasibility and, if promising, develop and implement pilot partnership for non-TriMet program during FY2020</li> <li>Develop steps during FY2019-FY2020 with partners to implement future pilot using autonomous vehicle technology</li> </ul>						




<sup>9</sup> <http://trimet.org/lowincome>

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## CUSTOMERS GOAL 2: Satisfied Community Stakeholders and Employers

OBJECTIVE	STATUS	RESULTS
10. Advance mobility for those with limited options	 Projected 15.4 million rides on fixed route service by seniors and persons with disabilities (down from 15.6 million)	<ul style="list-style-type: none"> <li>▪ LIFT customer service survey completed</li> <li>▪ Gathered best practices and lessons learned from peer agencies for potential pilot project(s)</li> </ul>
	 Completed LIFT customer service survey	
	 Cost per ride on LIFT service increased 4.75 percent (above inflation <sup>10</sup> )	




	MEASURE / TARGET	KEY STRATEGIC ACTIONS
FY2019 - FY2023	Rides for seniors and persons with disabilities provided on fixed route service equal to or greater than previous year	<ul style="list-style-type: none"> <li>▪ Increase flexibility of services and tools for riders               <ul style="list-style-type: none"> <li>○ Explore alternatives for using MOD Sandbox</li> <li>○ Automated call-back function for LIFT riders</li> <li>○ Implement Hop Fastpass™ integration for LIFT bus and cab service</li> </ul> </li> </ul>
	Customer satisfaction rating on LIFT equal to or greater than previous year	<ul style="list-style-type: none"> <li>▪ Complete and implement LIFT strategic plan</li> <li>▪ Implement pilot project(s) with other providers</li> <li>▪ Pursue most promising approaches from New Mobility Analysis</li> </ul>
	Cost/ride on LIFT service at or below targeted budget amount	<ul style="list-style-type: none"> <li>▪ Implement pilot project for demand responsive service for seniors and persons with disabilities. Begin pilot by FY2020 following engagement with riders and public</li> </ul>

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<sup>10</sup> Compared to 3.9 percent annual rate as of the end of calendar 2017 [http://www.bls.gov/regions/west/news-release/consumerpriceindex\\_portland.htm](http://www.bls.gov/regions/west/news-release/consumerpriceindex_portland.htm); but BLS is shifting methodology so future targets must change




## CUSTOMERS GOAL 2: Satisfied Community Stakeholders and Employers

OBJECTIVE	STATUS	RESULTS
<b>11. Improve environmental performance and stewardship</b>	<b>FY2018</b>  Retired more pre-2007 diesel buses  Developed initial analysis of electric bus conversion costs and benefits  Emissions reduction of riding TriMet vs driving single occupancy vehicle increased slightly <sup>11</sup>	<ul style="list-style-type: none"> <li>▪ Thirty-four diesel buses originally purchased in 1999 were retired, removed from the fleet and replaced with new, more fuel-efficient, lower-emission buses. The new buses also have an innovative cooling system that improves fuel economy by five to ten percent</li> <li>▪ Five battery electric buses purchased (delivery expected before end of calendar year 2018) and charging facilities constructed</li> <li>▪ Initiated an Environmental and Sustainability Management System (ESMS) at the Elmonica Rail Maintenance Facility to reduce emissions and improve energy efficiency of operations at our facilities</li> </ul>
	<b>FY2019 - FY2023</b> <b>MEASURE / TARGET</b> Greenhouse gas and air pollutant emissions reduction vs. single occupancy vehicle equal to or greater than previous year <sup>11</sup>	<b>KEY STRATEGIC ACTIONS</b> <ul style="list-style-type: none"> <li>▪ Complete remaining fleet conversion by retiring pre-2007 diesel engines</li> <li>▪ Develop and recommend clean fuel buses policy in FY2019 and plan for conversion of bus fleet informed by results from pilot fleet of electric buses</li> <li>▪ Complete implementation of ESMS at Elmonica facility in FY2019-FY2020 and initiate the ESMS at one other maintenance facility</li> </ul>


<sup>11</sup> Lag in available data may require changes to measure in the future

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### CUSTOMERS GOAL 3: Satisfied Broader Community

OBJECTIVE		STATUS	RESULTS
<b>12. Ensure strong support for transit and TriMet</b>	FY2018	 Overall public approval <sup>12</sup> rating for TriMet at 73 percent (79 percent for riders)	<ul style="list-style-type: none"> <li>Approval rating not meeting target of 80 percent for all respondents (including non-riders)</li> <li>Engaged public on service plans through public meetings, open houses, engagement with under-represented communities and in multiple languages, and online surveys (over 5,600 respondents), with more meetings and public workshops scheduled</li> <li>Provided information in dashboards and via media about improvements by TriMet in on-time performance and service expansion</li> <li>Engaged public and provided information about budget development, Service Enhancement Plans, Annual Service Plans, and transit improvement projects such as Division Transit Project, Southwest Corridor Project, MAX Red Line Improvements Project, fourth bus garage, and more than a dozen other, smaller projects scattered across the district</li> </ul>




	MEASURE / TARGET	KEY STRATEGIC ACTIONS
FY2019 - FY2023	Approval rating at or above 80 percent Attitude & Awareness survey (combined riders and non-riders)	<ul style="list-style-type: none"> <li>Enhance opportunities for public engagement and incorporate stakeholder and community needs in planning and decision-making with emphasis on low-income and minority engagement</li> </ul>
	All Board objectives for General Manager <sup>13</sup> completed: FY2019	<ul style="list-style-type: none"> <li>Develop additional strategies for sharing information about TriMet performance and benefits to the broader community</li> </ul>

OBJECTIVE		STATUS	RESULTS
<b>13. Increase funding for regional mobility expansion</b>	FY2018	 Completed Division Transit Project Finance Plan	<ul style="list-style-type: none"> <li>Secured additional funding via HB2017 for service enhancement and the introduction of the Low-Income Fare starting July 1, 2018</li> <li>Secured additional \$45 million in funding for design and development of SW Corridor</li> <li>Division Transit Project rated "Medium High" by Federal Transit Administration</li> </ul>

	MEASURE / TARGET	KEY STRATEGIC ACTIONS
FY2019 - FY2023	Needed investments in Southwest Corridor obtained: FY2021	Develop actions, plans, and resource strategies that create enhanced investment in addressing congestion, enhancing mobility, and fostering economic growth

<sup>12</sup> Respondents who "strongly approve" or "somewhat approve" of "the job TriMet is doing"

<sup>13</sup> <http://news.trimet.org/2018/02/trimet-board-of-directors-chooses-coo-doug-kelsey-as-agencys-next-general-manager/>

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## Internal Business Practices Goals

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

OBJECTIVE	STATUS <sup>14</sup>	RESULTS						
14. Increase personal safety	<b>FY2018</b> 1.4 passenger injuries per million boardings <sup>15</sup> Deaths occurred (including one suicide) On schedule for Rail Safety Audit with 36 of 42 actions completed to date <i>Collisions per 100,000 miles:</i> Bus: 2.4 (excluding minor incidents such as mirror damage) <sup>15</sup> MAX: 1.5 <sup>15</sup> LIFT: 1.0 <sup>15</sup> WES: 0.0 <sup>15</sup>	<ul style="list-style-type: none"> <li>Over 97 percent of bus operators have had Safety Management System (SMS) training during FY2018</li> <li>Rail operator annual training, scheduled to be complete before June 30, includes SMS training</li> <li>Over 200 Operations administration and management personnel have received SMS training this year</li> <li>Internal safety dashboards distributed to all departments</li> <li>Developed strategy to reduce MAX right-of-way intrusions by cars. Identified locations and designs. Installed some improvements with more scheduled for FY2019</li> </ul>						
	<b>FY2019 - FY2023</b> <table border="1"> <thead> <tr> <th>MEASURE / TARGET</th> <th>KEY STRATEGIC ACTIONS</th> </tr> </thead> <tbody> <tr> <td>1.9 or fewer passenger injuries per million boardings</td> <td rowspan="4"> <ul style="list-style-type: none"> <li>Implement Safety Management System (SMS) plan, including but not limited to:                             <ul style="list-style-type: none"> <li>Enhance SMS internal dashboards for each level of organization and coordinate through balanced scorecard for consistency; avoiding duplication</li> </ul> </li> <li>Implement all recommendations from rail safety audit by end of calendar year 2018</li> <li>Supplement physical infrastructure to increase safety, e.g., planned intersection treatments to minimize ROW intrusions by automobiles</li> <li>Refine crime reduction strategies, including:                             <ul style="list-style-type: none"> <li>Enhance effectiveness of policing</li> <li>Improve transit police response time to reported crimes</li> <li>Increase employee and contractor high-visibility presence on system</li> </ul> </li> <li>Continue treatments to reduce MAX right-of-way intrusions</li> </ul> </td> </tr> <tr> <td>Zero preventable deaths</td> </tr> <tr> <td>Remaining Rail Safety Audit<sup>16</sup> Strategy Actions completed: FY2019</td> </tr> <tr> <td> <i>Collisions per 100,000 miles</i> <ul style="list-style-type: none"> <li>Bus: 4.4 (includes all incidents)<sup>17</sup></li> <li>MAX: 1.2</li> <li>LIFT: 1.2</li> <li>WES (per year): &lt;1</li> </ul> </td> </tr> </tbody> </table>	MEASURE / TARGET	KEY STRATEGIC ACTIONS	1.9 or fewer passenger injuries per million boardings	<ul style="list-style-type: none"> <li>Implement Safety Management System (SMS) plan, including but not limited to:                             <ul style="list-style-type: none"> <li>Enhance SMS internal dashboards for each level of organization and coordinate through balanced scorecard for consistency; avoiding duplication</li> </ul> </li> <li>Implement all recommendations from rail safety audit by end of calendar year 2018</li> <li>Supplement physical infrastructure to increase safety, e.g., planned intersection treatments to minimize ROW intrusions by automobiles</li> <li>Refine crime reduction strategies, including:                             <ul style="list-style-type: none"> <li>Enhance effectiveness of policing</li> <li>Improve transit police response time to reported crimes</li> <li>Increase employee and contractor high-visibility presence on system</li> </ul> </li> <li>Continue treatments to reduce MAX right-of-way intrusions</li> </ul>	Zero preventable deaths	Remaining Rail Safety Audit <sup>16</sup> Strategy Actions completed: FY2019	<i>Collisions per 100,000 miles</i> <ul style="list-style-type: none"> <li>Bus: 4.4 (includes all incidents)<sup>17</sup></li> <li>MAX: 1.2</li> <li>LIFT: 1.2</li> <li>WES (per year): &lt;1</li> </ul>
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<sup>14</sup> Crime statistics reporting requirements have changed so data available is not compatible with how FY2018 Business Plan described measure – results are therefore not reported and measures for future years adjusted accordingly. TriMet will work with regional law enforcement and the public safety and security advisory committee to develop appropriate measures during FY2019.

<sup>15</sup> FY2018 year to date as of May 2018.

<sup>16</sup> [www.trimet.org/meetings/board/pdfs/2016-12-14/rail-compliance-audit-report.pdf](http://www.trimet.org/meetings/board/pdfs/2016-12-14/rail-compliance-audit-report.pdf)

<sup>17</sup> FY2019 data and target will have a wider definition of collisions including mirror damage necessitating an updated target

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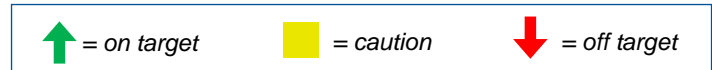
## INTERNAL BUSINESS PRACTICES GOAL 1: Deliver Safe, Efficient, and Equitable Service

OBJECTIVE	STATUS	RESULTS
<b>15. Provide reliable performance</b>	<b>FY2018</b> On-time performance: ↑ Bus: 85.6 percent <sup>18</sup> ↑ MAX: 88.4 percent <sup>18</sup> ↓ LIFT: 91.4 percent <sup>19</sup> ■ WES: 94.2 percent <sup>18</sup>	<ul style="list-style-type: none"> <li>Significantly improved on-time performance for both bus and MAX (4.8 percent improvement for bus and 3.3 percent improvement for MAX)</li> <li>Completed Red Line and Blue Line MAX power system improvements to reduce heat-related speed restrictions, reducing delays during hot weather</li> <li>Increased mean distance between failures (miles between breakdowns) for light rail vehicles in FY2018 YTD by 26 percent compared to previous year</li> <li>Adjusted and aggressively managed departures from layover locations to improve on-time performance and added reserve vehicles to fill service gaps when needed</li> </ul>





	MEASURE / TARGET	KEY STRATEGIC ACTIONS		
<b>FY2019 - FY2023</b>	On-time performance – percentage of trips on schedule (less than one minute early and no more than five minutes after scheduled time)	<ul style="list-style-type: none"> <li>Further implement agency-wide, multi-faceted dashboard for capturing agency performance</li> <li>Deliver agency-wide, multi-faceted strategy for improving the service and maintenance components that contribute to on-time performance (especially vehicle reliability and switch reliability)</li> <li>Benchmark efforts across multiple agencies to provide enhanced feedback on performance</li> </ul>		
	Bus		83.2 percent	85 percent
	MAX		87 percent	90 percent
	LIFT		93.5 percent	93.5 percent
	WES		95 percent	95 percent
	On-time performance on minority and low-income lines better than or within 5 percent of non-minority and non-low income lines			

<sup>18</sup> FY18 average through May 2018




<sup>19</sup> 12 month average through May 2018







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

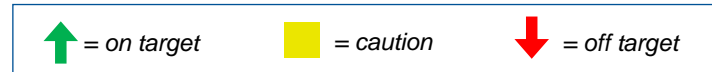
OBJECTIVE	STATUS	RESULTS
16. Improve service delivery	<b>FY2018</b>  156.9 miles of MAX and Frequent Bus lines (up 1.3 miles due to extension of Frequent Service Line 6)  2.1 percent overloaded peak trips on MAX and Bus (up slightly from rounded 2.1 percent)  13.7 mph on bus (down from 13.8)  18.0 mph on MAX (no increase; same as last year)	<ul style="list-style-type: none"> <li>Implemented construction, installed equipment, and introduced process improvements to remove several identified trackway impediments to reliable service, including Gateway and the Steel Bridge</li> <li>Extended Frequent Service Line 6 – Martin Luther King, Jr Blvd in September 2017</li> <li>Developed procurement and transition plan for agency-wide enterprise content management system</li> <li>Developed multi-organizational plan for regional coordination of transportation data and formulating pilot project for Portland Urban Data Lake</li> </ul>

	MEASURE / TARGET	KEY STRATEGIC ACTIONS
<b>FY2019 - FY2023</b>	Number of miles of Frequent Service (bus and MAX) lines equal to or greater than previous year	<ul style="list-style-type: none"> <li>Develop operations and travel time improvements strategy for rail and bus including:               <ul style="list-style-type: none"> <li>Internet of things/Smart Cities strategies</li> <li>Rail operations optimization technology project</li> </ul> </li> <li>Acquire land and construct a fourth bus garage</li> <li>Expand service with HB2017 funding, with enhanced service to low-income communities, including service to East Portland and East Multnomah County in FY2019</li> <li>Design and implement bus and rail operations improvements including signal, street improvements, and operating procedure improvements</li> <li>Develop Comprehensive Service Assessment including Service Planning and Scheduling Best Practices review and implement key identified best practices and recommended actions for fixed route and LIFT</li> <li>Develop and implement agency-wide solutions for technology modernization to improve data analysis and information sharing:               <ul style="list-style-type: none"> <li>Implement enterprise content management system beginning in FY2019 to improve document and information sharing across the agency, improving efficiency and communication, and support internal alignment, quality service, and safe and efficient operations</li> <li>Coordinate data analysis and reporting across TriMet and pilot information technology tools</li> </ul> </li> <li>Implement pilot project for Portland Urban Data Lake in FY2019 and FY2020</li> </ul>
	2 percent or fewer overloaded weekday peak trips on 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	

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



OBJECTIVE	STATUS	RESULTS
<b>17. Ensure cost-effective service</b>	<b>FY2018</b>  Bus Cost per vehicle hour rose 4.4 percent <sup>20</sup>  MAX Cost per vehicle hour rose 4.7 percent <sup>20</sup>  WES Cost per vehicle hour dropped 1.8 percent <sup>20</sup>  LIFT Cost per vehicle hour rose 4.3 percent <sup>20</sup>	<ul style="list-style-type: none"> <li>▪ WES cost increase stayed below inflation<sup>21</sup></li> <li>▪ Bus, MAX and LIFT cost per vehicle hour exceeded inflation<sup>20</sup></li> <li>▪ Bonds for capital needs issued on time and cost effectively</li> </ul>
	<b>FY2019 - FY2023</b> <b>MEASURE / TARGET</b> Annual increase in cost per vehicle hour (bus, MAX, WES, LIFT/CAB) less than or equal to targeted budget amount	<b>KEY STRATEGIC ACTIONS</b> <ul style="list-style-type: none"> <li>▪ Develop Operations and Maintenance strategy including:               <ul style="list-style-type: none"> <li>○ Establish initial Six Sigma™-type approaches and program</li> </ul> </li> <li>▪ Ensure necessary capital and operating needs are approved and deployed to support new service before implementation</li> <li>▪ Ensure market-competitive labor costs</li> </ul>

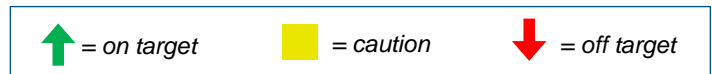


<sup>20</sup> Year-over-year as of May 2018


<sup>21</sup> Compared to 3.9 percent annual rate as of the end of calendar 2017 [http://www.bls.gov/regions/west/news-release/consumerpriceindex\\_portland.htm](http://www.bls.gov/regions/west/news-release/consumerpriceindex_portland.htm); but BLS is shifting methodology so future targets will need adjustment

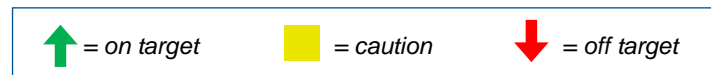
## INTERNAL BUSINESS PRACTICES GOAL 1: Deliver Safe, Efficient, and Equitable Service

OBJECTIVE	STATUS	RESULTS						
<b>18. Increase resiliency</b>	<b>FY2018</b>  All-Hazards Emergency Management Plan on schedule  Continuity of Operations Plan on schedule	<ul style="list-style-type: none"> <li>▪ First full All-Hazards Emergency Management Plan complete, submitted to the Oregon Department of Transportation, and ready for final execution</li> <li>▪ Continuity of Operations Plan on schedule for completion before end of FY2018</li> <li>▪ National Incident Management System (NIMS) incorporated into operator annual recertification and new hire training</li> <li>▪ Individual and employee family readiness materials distributed to staff as part of National Preparedness Month</li> </ul>						
	<b>FY2019 - FY2023</b> <table border="1"> <thead> <tr> <th data-bbox="491 583 863 631">MEASURE / TARGET</th> <th data-bbox="863 583 1967 631">KEY STRATEGIC ACTIONS</th> </tr> </thead> <tbody> <tr> <td data-bbox="491 631 863 862">Annual update of All-Hazards Emergency Management Plan (includes earthquake preparedness and climate change resilience) completed: before end of FY2019</td> <td data-bbox="863 631 1967 862"> <ul style="list-style-type: none"> <li>▪ Update annually and begin implementation of broad-based All-Hazards Management Emergency Plan including                             <ul style="list-style-type: none"> <li>○ Earthquake, extreme weather, and climate change</li> <li>○ Review of standards, design criteria, procurements, redundancy, and projects for long-term resilience</li> </ul> </li> <li>▪ Refresh and update Continuity of Operations Plan in FY2019</li> </ul> </td> </tr> <tr> <td data-bbox="491 862 863 1083">Continuity of Operations Plan finished and roll-out completed: mid-FY2019</td> <td data-bbox="863 862 1967 1083"> <ul style="list-style-type: none"> <li>▪ Develop new target(s) related to implementation of All-Hazards Management Emergency Plan for FY2020 and beyond</li> <li>▪ Implement NIMS:                             <ul style="list-style-type: none"> <li>○ Train all levels of the organization in NIMS</li> <li>○ Produce guide to home preparedness for all employees</li> <li>○ Provide additional direction to staff on disaster recovery roles and activities</li> </ul> </li> </ul> </td> </tr> </tbody> </table>	MEASURE / TARGET	KEY STRATEGIC ACTIONS	Annual update of All-Hazards Emergency Management Plan (includes earthquake preparedness and climate change resilience) completed: before end of FY2019	<ul style="list-style-type: none"> <li>▪ Update annually and begin implementation of broad-based All-Hazards Management Emergency Plan including                             <ul style="list-style-type: none"> <li>○ Earthquake, extreme weather, and climate change</li> <li>○ Review of standards, design criteria, procurements, redundancy, and projects for long-term resilience</li> </ul> </li> <li>▪ Refresh and update Continuity of Operations Plan in FY2019</li> </ul>	Continuity of Operations Plan finished and roll-out completed: mid-FY2019	<ul style="list-style-type: none"> <li>▪ Develop new target(s) related to implementation of All-Hazards Management Emergency Plan for FY2020 and beyond</li> <li>▪ Implement NIMS:                             <ul style="list-style-type: none"> <li>○ Train all levels of the organization in NIMS</li> <li>○ Produce guide to home preparedness for all employees</li> <li>○ Provide additional direction to staff on disaster recovery roles and activities</li> </ul> </li> </ul>	
MEASURE / TARGET	KEY STRATEGIC ACTIONS							
Annual update of All-Hazards Emergency Management Plan (includes earthquake preparedness and climate change resilience) completed: before end of FY2019	<ul style="list-style-type: none"> <li>▪ Update annually and begin implementation of broad-based All-Hazards Management Emergency Plan including                             <ul style="list-style-type: none"> <li>○ Earthquake, extreme weather, and climate change</li> <li>○ Review of standards, design criteria, procurements, redundancy, and projects for long-term resilience</li> </ul> </li> <li>▪ Refresh and update Continuity of Operations Plan in FY2019</li> </ul>							
Continuity of Operations Plan finished and roll-out completed: mid-FY2019	<ul style="list-style-type: none"> <li>▪ Develop new target(s) related to implementation of All-Hazards Management Emergency Plan for FY2020 and beyond</li> <li>▪ Implement NIMS:                             <ul style="list-style-type: none"> <li>○ Train all levels of the organization in NIMS</li> <li>○ Produce guide to home preparedness for all employees</li> <li>○ Provide additional direction to staff on disaster recovery roles and activities</li> </ul> </li> </ul>							




## INTERNAL BUSINESS PRACTICES GOAL 2: Design and Deliver Successful Projects

OBJECTIVE	STATUS	RESULTS
<b>19. Develop higher capacity bus services</b>	 Division Transit Project schedule modified	<ul style="list-style-type: none"> <li>▪ Division Transit Project received a “Medium High” rating from the Federal Transit Administration, making it eligible for up to 50 percent funding</li> <li>▪ Engaged public regarding design and service of Division Transit Project through community events (more than 25), open houses (four in-person, two online), regular committee meetings, one-on-one conversations with community members and property holders along the project alignment, and regular web and email updates</li> <li>▪ Engaged public regarding construction and expansion of capacity at Powell garage including an open house, community meetings, one-on-one conversations with nearby community members, and online information</li> </ul>
	<b>FY2018</b>	
	<b>MEASURE / TARGET</b> Division Transit Project in service: Fall 2022	<b>KEY STRATEGIC ACTIONS</b> <ul style="list-style-type: none"> <li>▪ For Division Transit Project:               <ul style="list-style-type: none"> <li>○ Continue public engagement</li> <li>○ Complete National Environmental Policy Act work</li> <li>○ Complete Federal Transit Administration (FTA) Project Development requirements</li> <li>○ Complete FTA Design</li> </ul> </li> <li>▪ Introduce higher capacity articulated buses on other bus line service, when and where appropriate, during the next five years</li> </ul>
	<b>FY2019 - FY2023</b>	









## INTERNAL BUSINESS PRACTICES GOAL 2: Design and Deliver Successful Projects

OBJECTIVE		STATUS	RESULTS
20. Develop partnerships to support faster and more reliable bus service	FY2018	 Progress on developing partnership and improving bus service. Three hotspots implemented during FY2018.	<ul style="list-style-type: none"> <li>Regional funding secured to provide seed funding for transit priority treatments on bus lines</li> <li>Engaging City of Portland, Metro, counties, other cities, and ODOT in regional Enhanced Transit Concept process to improve bus travel times and reliability</li> <li>Three bus congestion hotspots in City of Portland received improvements to travel times and reliability through congested intersections (Powell, Sandy, and the westbound approach to the Hawthorne Bridge)</li> </ul>


	MEASURE / TARGET	KEY STRATEGIC ACTIONS
FY2019 - FY2023	To be developed during FY2019	<ul style="list-style-type: none"> <li>Implement Enhanced Transit bus improvements. This includes:                             <ul style="list-style-type: none"> <li>Define highest priority needs for bus priority treatments</li> <li>Design improvements</li> <li>Secure funding</li> </ul> </li> <li>Improve transit priority on corridors and/or at hotspots</li> <li>Increase supportive policies for improving transit travel time and performance with the region, counties, cities, and ODOT</li> </ul>

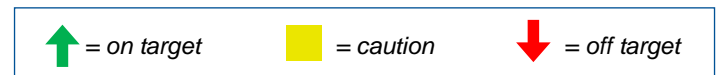
OBJECTIVE		STATUS	RESULTS
21. Meet milestones for successful development of SW Corridor	FY2018	 FY2018 milestones met—delivered Draft Environmental Impact Statement (DEIS) to FTA on time with consistent public engagement	<ul style="list-style-type: none"> <li>Developed DEIS in consultation with public, communities, and stakeholders, then submitted it to Federal Transit Administration for review</li> <li>Engaged public regarding design, environmental benefits, potential impacts of project, and equitable development through community groups and events (over 30 total). Distributed information at transit centers and provided support staff for Metro-hosted open houses and Community Advisory Committee meetings</li> </ul>

	MEASURE / TARGET	KEY STRATEGIC ACTIONS
FY2019 - FY2023	Complete definition of Locally Preferred Alternative (LPA): FY2019	<ul style="list-style-type: none"> <li>Complete FTA Project Development, including National Environmental Policy Act work and clearly defined LPA</li> <li>Continue public engagement on project</li> <li>Regional funding measure: Nov 2020</li> </ul>
	Enter FTA Project Development: FY2019	
	FEIS/ROD completed: FY2020	

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## INTERNAL BUSINESS PRACTICES GOAL 2: Design and Deliver Successful Projects

OBJECTIVE		STATUS	RESULTS
22. Improve existing MAX infrastructure for reliability and capacity	FY2018	 Strategy developed and ready for implementation	<ul style="list-style-type: none"> <li>▪ Completed strategy to improve infrastructure improvements and scheduled construction across multiple years</li> <li>▪ Upgraded train signaling system locations in downtown to improve integration of light rail with traffic signals</li> <li>▪ TriMet management and TriMet union (ATU) reached agreement, including ability to contract out for mid-life remanufacturing of older light rail vehicles</li> </ul>
	FY2019 - FY2023	MEASURE / TARGET	KEY STRATEGIC ACTIONS
		Programmed switch, track, control, and systems improvements completed: before end of FY2019	<ul style="list-style-type: none"> <li>▪ Implement Systems Reliability Improvement projects in Capital Improvement Plan (signal, overhead catenary system, light rail vehicle improvements) including:                             <ul style="list-style-type: none"> <li>○ Switch and track replacements on Steel Bridge, Hatfield Government Center, and Lloyd Center crossover completed before end of FY2019</li> <li>○ Control and signal improvements at Ruby Junction Yard and Elmonica Yard completed before end of FY2019</li> </ul> </li> <li>▪ Note that Key Strategic Actions also significantly address Objective 37</li> </ul>



### INTERNAL BUSINESS PRACTICES GOAL 3:

#### Business Practices that Create Value and Spur Innovation and Continuous Improvement

OBJECTIVE	STATUS	RESULTS
23. Maximize benefits and potential of Hop Fastpass™	 Introduced Hop Fastpass™ and saw substantial growth in use  Net benefit to TriMet measure not developed during FY2018 <sup>22</sup>	<ul style="list-style-type: none"> <li>Introduced Hop Fastpass™ with significant growth in use every month</li> <li>Coordinated with ODOT and smaller transit agencies around the region and across Oregon to prepare for potential adoption of Hop Fastpass™ in future years</li> <li>Worked with City of Portland to define technology integration approach to allow access to BIKETOWN account with Hop Fastpass™ card</li> </ul>




	MEASURE / TARGET	KEY STRATEGIC ACTIONS
FY2019 - FY2023	250,000 Hop transit users: by end of FY2022 <sup>23</sup>	<ul style="list-style-type: none"> <li>Conduct strategic review during FY2019 of additional benefits possible with Hop Fastpass™</li> <li>Phase out paper fares with robust public engagement during FY2019</li> <li>Encourage Oregon transit agencies and other entities to implement Hop</li> </ul>
	Number of additional business partners added annually: target to be developed during strategic review in FY2019 for start in FY2020	<ul style="list-style-type: none"> <li>Further integrate Hop Fastpass™ for uses such as Low-Income Fare, LIFT rides and Bike &amp; Ride secure bike parking facility access</li> <li>Review opportunities for Hop Fastpass™ data for marketing and service planning</li> </ul>

OBJECTIVE	STATUS	RESULTS
24. Test electric buses in service for performance and cost-effectiveness	 Pilot electric buses and charging infrastructure under construction	<ul style="list-style-type: none"> <li>Manufacturer began construction of TriMet-ordered, grant-funded buses with expected arrival of pilot bus before end of FY2018</li> <li>Design completed and construction underway for charging at Merlo bus garage</li> </ul>

	MEASURE / TARGET	KEY STRATEGIC ACTIONS
FY2019 - FY2023	Begin pilot battery electric bus service: FY2019	<ul style="list-style-type: none"> <li>Begin service and conduct assessment of efficiency, cost, and service reliability</li> <li>Develop broader fleet strategy</li> <li>Purchase additional clean-fuel buses during five year period</li> <li>Ensure bus garages will be compatible with electric charging infrastructure needs</li> </ul>


<sup>22</sup> Measure of net benefit to TriMet to be developed in later years




<sup>23</sup> Measure and Target under review and may be updated based on use patterns during the remainder of FY2018 and into FY2019

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## INTERNAL BUSINESS PRACTICES GOAL 3:

### Business Practices that Create Value and Spur Innovation and Continuous Improvement

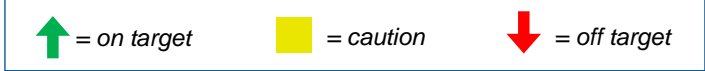
OBJECTIVE	STATUS	RESULTS
<b>25. Develop and pursue strategic partnerships to optimize and innovate practices and processes</b>	FY2018  Innovations developed, but broader partnership strategy needs additional work	<ul style="list-style-type: none"> <li>▪ Started strategic analysis of new mobility opportunities including autonomous vehicle technology</li> <li>▪ Developed and implemented innovations in risk data tracking and implementation</li> <li>▪ Developed concept, informed by peer transit agencies, for demand responsive pilot project for seniors and persons with disabilities and prepared for engagement of riders and public</li> </ul>
	FY2019 - FY2023 <b>MEASURE / TARGET</b> At least one project implemented and adding value during FY2019	<b>KEY STRATEGIC ACTIONS</b> <ul style="list-style-type: none"> <li>▪ Implement internal practices in each division that support partnership and innovation during FY2019</li> <li>▪ Pilot promising policy, products, and services from New Mobility analysis and develop long-term strategic approach for New Mobility opportunities</li> <li>▪ Develop approaches for integration of technology and policy framework to deploy technologies and use for the following:               <ul style="list-style-type: none"> <li>○ Complete development of “Mobility on Demand Sandbox” technologies to integrate transportation options</li> <li>○ Implement Pilot Rail operations optimization technology (ROOT) using Internet of Things technology applications for MAX vehicles</li> <li>○ Develop autonomous vehicle technology strategy, approaches, and partnership opportunities</li> <li>○ Connected vehicle and enhanced corridors</li> <li>○ Develop technology and partnership protocols to provide frictionless information and trip-planning, travel, and integrated payment options for customers</li> </ul> </li> <li>▪ Initiate strategic review of internal business processes in 2020 and launch change management and implementation strategy in 2021</li> <li>▪ Identify and act on opportunities within supply chain and operating platform for strategic partnerships</li> <li>▪ Implement pilot project for demand responsive service for seniors and persons with disabilities. Begin pilot by FY2020 following engagement with riders and public</li> </ul>

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### INTERNAL BUSINESS PRACTICES GOAL 3:

#### Business Practices that Create Value and Spur Innovation and Continuous Improvement

OBJECTIVE	STATUS	RESULTS
<b>26. Grow business inclusion and diversity efforts</b>	 Improved ability to encourage and track participation in contracting opportunities	<ul style="list-style-type: none"> <li>Implemented new electronic bidding system for contractors that will improve tracking of opportunities and success in hiring Disadvantaged Business Enterprises and/or Minority Business Enterprises (DBE/MBE)</li> </ul>
	<b>FY2019 - FY2023</b> MEASURE / TARGET Future targets to be developed during FY2019 for FY2020	<b>KEY STRATEGIC ACTIONS</b> <ul style="list-style-type: none"> <li>Enhance agency-wide efforts on diversity in contracting by extending and expanding upon Capital Projects best practice approaches to all contracting efforts</li> <li>Target and increase recruitment of small, DBE/MBE-certified firms for opportunities to do contract work for TriMet</li> <li>Build the regional pool of qualified contractors by mapping potentially eligible firms and helping them achieve DBE certification</li> <li>Work with other regional agencies to identify systemic strategies and approaches to supporting and strengthening the regional DBE/MBE contracting community</li> <li>Deliver on General Manager objective to increase executive diversity by calendar year 2020</li> <li>Hire increased staff for community outreach before end of FY2019 Q1</li> </ul>



### INTERNAL BUSINESS PRACTICES GOAL 3:

#### Business Practices that Create Value and Spur Innovation and Continuous Improvement

OBJECTIVE	STATUS	RESULTS
<b>27. Innovatively increase financial resources</b>	<div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; background-color: yellow; margin-right: 5px;"></div> <p>Considered use of TriMet-owned land for value capture but no projects or opportunities clearly defined yet</p> </div>	<ul style="list-style-type: none"> <li>▪ Initial analysis of TriMet-owned land opportunities yielded five projects with partners:               <ul style="list-style-type: none"> <li>○ Three projects where TriMet has sold land or in negotiations to sell to a non-profit developer who will construct affordable housing adjacent to transit (see Objective 7).</li> <li>○ Two projects still in negotiations, one value capture project for mixed market rate and affordable housing, the other likely office/commercial.</li> </ul> </li> <li>▪ Other opportunities not yet mature enough to predict value but will be pursued in future years</li> <li>▪ Registered with the State Department of Environmental Quality as a producer of carbon credits, providing opportunity to generate revenue for transit from reduced carbon emissions</li> </ul>
	<div style="display: flex; align-items: center;"> <div style="writing-mode: vertical-rl; transform: rotate(180deg); background-color: #0056b3; color: white; padding: 5px; font-weight: bold;">FY2018</div> </div>	
	<div style="display: flex; align-items: center;"> <div style="writing-mode: vertical-rl; transform: rotate(180deg); background-color: #0056b3; color: white; padding: 5px; font-weight: bold;">FY2019 - FY2023</div> </div>	
	<div style="display: flex; align-items: center;"> <div style="background-color: #0056b3; color: white; padding: 5px; font-weight: bold;">MEASURE / TARGET</div> </div>	<div style="display: flex; align-items: center;"> <div style="background-color: #0056b3; color: white; padding: 5px; font-weight: bold;">KEY STRATEGIC ACTIONS</div> </div>
	<p>Return on investment for pursuit of funding at least 3:1 average across FY2019-FY2023</p>	<ul style="list-style-type: none"> <li>▪ Advance strategy for leveraging current TriMet assets and intellectual property, e.g.:               <ul style="list-style-type: none"> <li>○ Use existing land, right-of-way, Park &amp; Rides, and other resources</li> </ul> </li> <li>▪ Pursue additional funding sources for TriMet projects</li> <li>▪ Deliver FY2019 external commercial opportunity scan</li> <li>▪ Significantly optimize revenue from carbon credits as a new revenue stream</li> </ul>




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## People & Innovation Goals

### PEOPLE & INNOVATION GOAL 1: Ensure a Culture of Safety





OBJECTIVE		STATUS	RESULTS
<b>28. Successfully implement and achieve strong acceptance of Safety Management System (SMS)</b>	<b>FY2018</b>	 Over 91 percent of active employees will have received SMS training during FY2018	<ul style="list-style-type: none"> <li>▪ Over 1,300 field employees, including over 97 percent of bus operators, received SMS training during FY2018</li> <li>▪ Over 95 percent of rail operators scheduled to have SMS training by end of annual recertification cycle in Summer 2018</li> <li>▪ All controllers, dispatch, and road supervisory personnel received SMS training</li> <li>▪ Work of Security Continuous Improvement Team including operators led to decision to install security panels for bus operators beginning FY2019</li> </ul>
		 Seven safety audits performed during FY2018	
 4.7 lost time injuries rate (per 200,000 hours worked)			
	<b>FY2019 - FY2023</b>	MEASURE / TARGET	KEY STRATEGIC ACTIONS
Minimum 90 percent of active employees have received SMS training within previous fiscal year		<ul style="list-style-type: none"> <li>▪ Implement SMS. Examples include:                             <ul style="list-style-type: none"> <li>○ Ensure 100 percent of all new employees and 90 percent of existing employees trained on SMS in each year of the five-year period, then ongoing annual training updates for all employees</li> <li>○ Continue Risk Analyses, including Operational and Job Hazard Analyses, to identify significant safety risks and implement mitigation measures</li> </ul> </li> <li>▪ Develop a sustainable communications strategy around safety performance outcomes</li> <li>▪ Deliver consistent departmental safety awareness information to existing and new employees</li> <li>▪ Implement and ensure effectiveness of safety risk mitigation measures. Develop and implement continuous improvement plans in operations safety. Deliver additional security technology, infrastructure, and practices. Involve continuous improvement teams that include direct-customer-serving staff in the development of safety and security risk mitigation strategies</li> </ul>	
Six or more safety audits performed annually			
5.4 per 200,000 hours or lower lost time injuries rate <sup>24</sup> : FY2022			
100 percent of responses to employees and safety committee items in 30 days or less of receipt			

<sup>24</sup> This target may need to be updated during FY2019 in keeping with OSHA requirements

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## PEOPLE & INNOVATION GOAL 2:

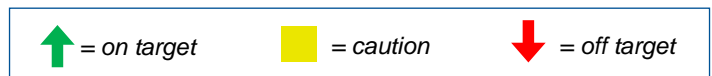
TriMet is Where Diverse and Talented People Want to Come, Stay, and Thrive

OBJECTIVE	STATUS	RESULTS																	
<b>29. Invest wisely in people</b>	<p><i>Target for objective is for three out of four individual measures to be at or above target value:</i></p> <p> 4.3 average score on engagement survey with one to six rating scale (six is best)</p> <p> 4.2 percent training and development costs (including tuition reimbursement) as a percentage of payroll</p> <p> 44 percent of employees below their predicted compensation (average ratio for those under target is 0.95)<sup>25</sup></p> <p> 5.6 percent turnover percentage – minus retirements from agency (overall)</p>	<ul style="list-style-type: none"> <li>Engagement survey completed. Employee engagement average below target at 4.3 (4.7 for non-union and 4.0 for union)</li> <li>Completed compensation pay equity analysis and developed approach to take remedial action</li> <li>Improved the percentage of employees below predicted compensation by eight percentage points in FY2018, Q3, all within budget. One division has achieved the goal of no employees below their predicted compensation</li> <li>Developed analysis and strategy to address pay below predicted compensation in future years</li> </ul>																	
	<table border="1"> <thead> <tr> <th data-bbox="401 748 453 1195">FY2019 - FY2023</th> <th data-bbox="453 748 1083 805">MEASURE / TARGET</th> <th data-bbox="1083 748 1986 805">KEY STRATEGIC ACTIONS</th> </tr> </thead> <tbody> <tr> <td data-bbox="401 805 453 886"></td> <td data-bbox="453 805 1083 886">4.5 or better on engagement survey benchmark<sup>26</sup> with one to six rating scale (six is best)</td> <td data-bbox="1083 805 1986 886"> <ul style="list-style-type: none"> <li>Take remedial measures for identified gaps in compensation equity pay analysis as needed during FY2019-FY2021</li> </ul> </td> </tr> <tr> <td data-bbox="401 886 453 967"></td> <td data-bbox="453 886 1083 967">At least four percent training and development costs as a percentage of payroll</td> <td data-bbox="1083 886 1986 967"> <ul style="list-style-type: none"> <li>During FY2019, continue to grow opportunities and use of internal learning and development program for TriMet staff</li> </ul> </td> </tr> <tr> <td data-bbox="401 967 453 1049"></td> <td data-bbox="453 967 1083 1049">Zero percent of employees below their predicted compensation<sup>27</sup>: FY2020</td> <td data-bbox="1083 967 1986 1049"> <ul style="list-style-type: none"> <li>Every two years, complete market survey of benchmark jobs</li> </ul> </td> </tr> <tr> <td data-bbox="401 1049 453 1130"></td> <td data-bbox="453 1049 1083 1130">For employees below predicted compensation, 1.0 ratio of actual salary to predicted compensation</td> <td data-bbox="1083 1049 1986 1130"></td> </tr> <tr> <td data-bbox="401 1130 453 1195"></td> <td data-bbox="453 1130 1083 1195">No more than five percent turnover percentage – minus retirements from agency</td> <td data-bbox="1083 1130 1986 1195"></td> </tr> </tbody> </table>	FY2019 - FY2023	MEASURE / TARGET	KEY STRATEGIC ACTIONS		4.5 or better on engagement survey benchmark <sup>26</sup> with one to six rating scale (six is best)	<ul style="list-style-type: none"> <li>Take remedial measures for identified gaps in compensation equity pay analysis as needed during FY2019-FY2021</li> </ul>		At least four percent training and development costs as a percentage of payroll	<ul style="list-style-type: none"> <li>During FY2019, continue to grow opportunities and use of internal learning and development program for TriMet staff</li> </ul>		Zero percent of employees below their predicted compensation <sup>27</sup> : FY2020	<ul style="list-style-type: none"> <li>Every two years, complete market survey of benchmark jobs</li> </ul>		For employees below predicted compensation, 1.0 ratio of actual salary to predicted compensation			No more than five percent turnover percentage – minus retirements from agency	
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	No more than five percent turnover percentage – minus retirements from agency																		

<sup>25</sup> Measure identified in FY2018 Plan was replaced with these measures (percentage below predicted compensation and ratio below predicted compensation) because the new measures more accurately portray current status

<sup>26</sup> Benchmark based on other employers in similar industries


<sup>27</sup> Based on Objective Compensable Factors and meets Oregon Pay Equity Act requirements








## PEOPLE & INNOVATION GOAL 2:

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



OBJECTIVE	STATUS	RESULTS
<b>30. Ensure open and honest communication between management and direct-customer-serving employees</b>	 Quantum employee survey results from communication question (“There is open and honest communication between employees and manager”) averaged 3.7 (4.4 for non-union and 3.1 for union)	<ul style="list-style-type: none"> <li>Multiple internal committees with broad representation include new scheduling-led Employee Round Tables, Continuous Improvement Teams, ongoing Service Performance and Development Committee, and Service Change Management Committee</li> <li>Implemented Business Plan discussion and feedback sessions with field operations and other in-field staff</li> <li>Targets developed for FY2019 and beyond</li> <li>Internal education and training program includes communication skills, inclusiveness and cultural agility for all including managers</li> </ul>
	MEASURE / TARGET	KEY STRATEGIC ACTIONS
	FY2019 - FY2023 Meet or exceed benchmark <sup>28</sup> average of 4.0 (out of six) on communication question (“There is open and honest communication between employees and manager”)	<ul style="list-style-type: none"> <li>Develop and implement strategies in each division to strengthen internal communication channels, especially with direct-customer-serving employees, including more face-to-face communication</li> <li>Implement regular meetings between leaders and employees</li> </ul>


<sup>28</sup> 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
<b>31. Foster sense of community and cross-functional camaraderie</b>	<div style="display: flex; align-items: center;"> <div style="writing-mode: vertical-rl; transform: rotate(180deg); font-weight: bold; margin-right: 5px;">FY2018</div> <div style="margin-right: 10px;">  </div> <div> <p>Some progress but still working on strategy development</p> </div> </div> <div style="display: flex; align-items: center; margin-top: 10px;"> <div style="writing-mode: vertical-rl; transform: rotate(180deg); font-weight: bold; margin-right: 5px;">FY2019</div> <div style="margin-right: 10px;">  </div> <div> <p>167 employees participated in volunteer events during FY18 so far (76 community benefit and 91 TriMet internal and service opportunities with the two largest events of the year still to come)</p> </div> </div>	<ul style="list-style-type: none"> <li>▪ Multiple internal committees with broad representation include new scheduling-led employee roundtables, Continuous Improvement Teams, ongoing Service Performance and Development Committee, and Service Change Maintenance Committee</li> <li>▪ Offered volunteer opportunities to benefit community causes through “Team TriMet” and other opportunities including Oregon Food Bank, Union Gospel Mission, Pride Parade, and Heart Walk</li> <li>▪ Volunteer efforts to support TriMet colleagues such as Bus Roadeo, holiday dinners, and Transit Driver Appreciation Day</li> <li>▪ Supplemented rider information during major service disruptions and community events with voluntary Ride Guide and Ask Me duty (not currently included in measure)</li> </ul>
	<div style="display: flex; align-items: center;"> <div style="writing-mode: vertical-rl; transform: rotate(180deg); font-weight: bold; margin-right: 5px;">FY2019 - FY2023</div> <div style="margin-right: 10px;"> <p><b>MEASURE / TARGET</b></p> </div> </div> <p>To be defined after strategy development related to number of opportunities for connections between direct-customer-serving employees and office employees</p> <hr/> <p>Number of employees participating in external- and colleague-serving volunteer events equal to or higher than previous year</p>	<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> <p><b>KEY STRATEGIC ACTIONS</b></p> </div> </div> <ul style="list-style-type: none"> <li>▪ Develop and implement strategy for cross-functional engagement and connections between TriMet employees in different departments. Use committees with broad representation including direct-customer-serving employees. Look for additional opportunities to create and strengthen cross-divisional work teams, information sessions, and social events</li> <li>▪ Include executive management in volunteer activities</li> </ul>






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## PEOPLE & INNOVATION GOAL 2:

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

OBJECTIVE	STATUS	RESULTS
<b>32. Achieve agency Affirmative Action goals</b>	 23.6 percent utilization rate for race (non-white) in management positions <sup>29</sup>	<ul style="list-style-type: none"> <li>Utilization rate for race in management positions is above the availability rate of 17.8 percent<sup>29</sup></li> <li>Utilization rate for race in all TriMet District positions is above the availability rate of 23.9 percent<sup>30</sup></li> <li>Utilization rate for gender in management positions is close to target, but is below the availability rate of 33.5 percent.<sup>29</sup></li> <li>Utilization rate for gender in all TriMet District positions is below the availability rate of 30 percent<sup>30</sup></li> <li>No Affirmative Action Plan placement goals required for 9 of 12 job groups for management positions, or in 31 of 38 job groups District-wide</li> <li>TriMet increased its diversity on the Executive Team by adding two men of color during FY2018</li> <li>Workforce diversity review started as part of Board-identified objectives for General Manager</li> </ul>
	 26.3 percent utilization rate for race (non-white) in all TriMet District positions <sup>30</sup>	
	 31.9 percent utilization rate for gender (female) in management positions <sup>29</sup>	
	 26.2 percent utilization rate for gender (female) in all TriMet District positions <sup>30</sup>	
	 TriMet's Executive Team has a utilization for race (non-white) of 30 percent, and a utilization rate for gender (female) of 20 percent	

	MEASURE / TARGET	KEY STRATEGIC ACTIONS									
<b>FY2019 - FY2023</b>	Utilization rates are equal to or exceed weighted average availability rates in TriMet's Affirmative Action Plan <sup>31</sup> for management positions and all TriMet District positions: end of FY2020 <table border="1" data-bbox="449 915 1346 1057"> <thead> <tr> <th></th> <th>Management Job Groups</th> <th>All Job Groups</th> </tr> </thead> <tbody> <tr> <td>Race (non-white)</td> <td>17.8 percent</td> <td>23.9 percent</td> </tr> <tr> <td>Gender (female)</td> <td>33.5 percent</td> <td>30.0 percent</td> </tr> </tbody> </table>		Management Job Groups	All Job Groups	Race (non-white)	17.8 percent	23.9 percent	Gender (female)	33.5 percent	30.0 percent	<ul style="list-style-type: none"> <li>Use additional methods to recruit diverse candidates, including using search firms that are skilled in recruitment of diverse candidates</li> <li>Implement research- and outreach-based search techniques to identify candidates</li> </ul>
		Management Job Groups	All Job Groups								
	Race (non-white)	17.8 percent	23.9 percent								
	Gender (female)	33.5 percent	30.0 percent								
	At least 6.4 percent utilization rate for veterans										
At least 7 percent utilization rate for persons with disabilities											
Utilization rate for executive positions is equal to or exceeds availability rates in TriMet's Affirmative Action Plan within 18 months											

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<sup>29</sup> Target utilization rate is based on a weighted average for all management job groups; availability and utilization for individual job group will vary.




<sup>30</sup> Target utilization rate is based on a weighted average for all job groups; availability and utilization for individual job group will vary.

<sup>31</sup> <http://trimet.org/equity/pdf/affirmative-action-plan.pdf>. Note that targets are periodically updated based on latest availability figures and may not always be current on trimet.org.


## PEOPLE & INNOVATION GOAL 2:




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

OBJECTIVE		STATUS	RESULTS
<b>33. Recruit a talented workforce</b>	FY2018	 94 percent average year to date acceptance to offer ratio  61.1 days average time to fill positions	<ul style="list-style-type: none"> <li>Acceptance to offer well above target</li> <li>Average time to fill was at target during first half of year, but now drifting higher</li> <li>Increased outreach and recruitment efforts for talent and diversity of candidates</li> </ul>
	FY2019 - FY2023	MEASURE / TARGET	KEY STRATEGIC ACTIONS
		75 percent or higher acceptance to offer ratio	<ul style="list-style-type: none"> <li>Continue current practices as long as targets are met</li> <li>If targets continue to be met during FY2019, consider different targets</li> </ul>
		60 days or less average time to fill positions	
OBJECTIVE		STATUS	RESULTS
<b>34. Plan for Succession for Key Positions</b>	FY2018	 47.5 percent of identified key positions have “ready now” or “ready soon” candidates (target was 50 percent)	<ul style="list-style-type: none"> <li>Identified 40 key positions for the continuity of operations at TriMet</li> <li>“Ready now” candidates identified for multiple positions, but below target percentage of all positions</li> </ul>
	FY2019 - FY2023	MEASURE / TARGET	KEY STRATEGIC ACTIONS
		50 percent or more of key positions included in succession plans have candidates identified as “ready now” or “ready soon”: FY2020	<ul style="list-style-type: none"> <li>Enhance and implement Succession Readiness Plan:                             <ul style="list-style-type: none"> <li>Use succession plan information for targeted training and development of candidate successors</li> <li>Engage identified potential successors in planned development</li> </ul> </li> <li>Recruit with succession in mind for positions reporting to positions without “ready now” successors</li> </ul>

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### PEOPLE & INNOVATION GOAL 3: Foster Service Excellence and Innovation



OBJECTIVE	STATUS	RESULTS
<b>35. Foster employee innovation</b>	FY2018  Some progress made in encouraging innovation especially in operational divisions	<ul style="list-style-type: none"> <li>Strategy and practice being developed with emphasis in operations</li> </ul>
	FY2019 - FY2023 <b>MEASURE / TARGET</b> Strategy implemented: FY2019	<b>KEY STRATEGIC ACTIONS</b> <ul style="list-style-type: none"> <li>Create a regular practice of recognizing and encouraging innovation in all areas, including process improvements</li> <li>Develop periodic division- or department-level recognition for innovation</li> <li>Provide external training on fostering innovation to some employees and provide time and venues to share strategies and practices with other employees</li> </ul>

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## Financial Goals




### FINANCIAL GOAL 1:

#### Fiscally Sound and Compliant

OBJECTIVE	STATUS	RESULTS
<b>36. Manage financial performance within Strategic Financial Plan guidelines</b>	<b>FY2018</b>  Five of six guidelines Strategic Financial Plan <sup>32</sup> guidelines met  Net medical benefits cost per covered employee <i>decreased</i>	<ul style="list-style-type: none"> <li>The one Strategic Financial Plan guideline not met in FY2018 is that service cost grew faster than general inflation as TriMet increased maintenance staff and met other obligations of a growing system</li> <li>The net medical benefits cost per covered employee target is \$1,400 per month; it has been reduced to \$1,157, a 14 percent reduction</li> <li>Budget process refined and streamlined with new information technology</li> <li>More frequent individual departmental reviews of budget ensuring closer alignment with projected needs</li> <li>Business Plan rolled out for all divisions and incorporated into annual bus and rail operator training</li> <li>Most managerial and administrative staff have participated in Business Plan rollout meetings and activities. Business Plan incorporated into annual review process. Reporting on key measures to executive team has begun</li> </ul>
	<b>FY2019 - FY2023</b> Meet all six Strategic Financial Plan guidelines: FY2019 Net medical benefits cost per covered employee increases at a rate no greater than the Federal Employment Cost Index <sup>33</sup>	<b>KEY STRATEGIC ACTIONS</b> <ul style="list-style-type: none"> <li>Actively manage and enhance financial performance and decision-making</li> <li>Refine measurement, analysis, reporting, and management approaches to ensure budget process and strategic planning are fully aligned</li> <li>Achieve active and retiree contributions to premium costs that are consistent with industry peers</li> <li>Develop and implement an agency-wide risk registry during FY2019</li> </ul>


<sup>32</sup> [www.trimet.org/pdfs/sfp/14-07-37-Strategic-Financial-Plan-WEB.pdf](http://www.trimet.org/pdfs/sfp/14-07-37-Strategic-Financial-Plan-WEB.pdf)




<sup>33</sup> [www.bls.gov/nscs/ect/](http://www.bls.gov/nscs/ect/)

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## FINANCIAL GOAL 2:


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

OBJECTIVE	STATUS	RESULTS
<b>37. Meet or exceed state of good repair targets for all identified asset classes</b>	 FY2018: Complete Transit Asset Management (TAM) Plan	<ul style="list-style-type: none"> <li>TAM Plan inventory and condition assessments completed for FY2018</li> <li>TAM Plan on-target to be complete before federal deadline of October 1, 2018, but will not complete by original target of June 30, 2018 (end of FY2018)</li> <li>FY2019 proposed budget includes increased allocation to state of good repair</li> </ul>
	<b>FY2019 - FY2023</b> MEASURE / TARGET Zero asset classes below established targets in the short, medium, and long term, as defined in the Transit Asset Management Plan: FY2022	<b>KEY STRATEGIC ACTIONS</b> <ul style="list-style-type: none"> <li>Complete federally-required TAM Plan before federal deadline October 2018. Complete inventory and condition assessment of existing assets and develop targets for all asset categories</li> <li>During five year period, develop and implement plan to repair, replace or otherwise remedy any asset classes not fully at target</li> <li>Map business process for asset inventory, condition assessment, maintenance, and management during FY2019, then identify process and technology improvements for implementation in future years</li> </ul>




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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
<b>38. Manage financial capacity to deliver regional expectations for service growth</b>	<b>FY2018</b>  3.42 percent growth in bus service hours for FY2018 (compared to target of 2.1 percent average)	<ul style="list-style-type: none"> <li>▪ HB2017 Advisory Committee<sup>34</sup> formed and meeting to inform TriMet's Transit Improvement Plan. On schedule to meet state deadlines during 2018 calendar year</li> </ul>
	<b>FY2019 - FY2023</b> <b>MEASURE / TARGET</b> 3.1 percent average growth in annual percentage of new bus service enhancement, including growth funded by HB2017: FY2019-FY2022	<b>KEY STRATEGIC ACTIONS</b> <ul style="list-style-type: none"> <li>▪ During FY2019, obtain final approval from Oregon Transportation Commission for HB2017-funded service and capital needs and implement approved Plan</li> <li>▪ Every year, prioritize sufficient operating funds, and additional HB2017 funds to meet the priorities identified for service improvements in each Annual Service Plan</li> </ul>


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




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### FINANCIAL GOAL 3:

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

OBJECTIVE		STATUS	RESULTS
39. Maintain acceptable farebox recovery to optimize the balance of service demands, revenue, and cost	FY2018	 Fixed-route farebox at 23.2 percent <sup>35</sup>	<ul style="list-style-type: none"> <li>Fare recovery ratio has stayed above target for the fiscal year so far, but at least one month was below target, so need to watch trends carefully</li> <li>Hop Fastpass™ introduced July 2017 and over 17 percent of fare revenue (and growing) received via Hop as of May 2018</li> </ul>
	FY2019 - FY2023	<b>MEASURE / TARGET</b> 25 percent or greater farebox recovery (passenger revenue/ operations cost) for fixed route	<b>KEY STRATEGIC ACTIONS</b> <ul style="list-style-type: none"> <li>In FY2020, after the previous six years with no fare increase, implement incremental increases in fares as called for in adopted fare policy<sup>36</sup>, approximately \$0.10 every two years</li> <li>Finish implementation of Hop Fastpass™ with institutional pass users in FY2019</li> <li>During five year period, develop and implement strategies to reduce fare evasion</li> </ul>

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<sup>35</sup> YTD as of May 2018. Operating expenditures were higher than originally expected and were made in anticipation of adding significantly more service in FY2019 than initially planned due to the adoption of HB2017. Fare revenue from the new service in future years will offset operating costs in those years with the result of improving the farebox recovery ratio

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

# The Route Ahead

Each year's Strategic Business Plan is, by necessity, a dynamic document. This is our first annual update, reflecting on performance for FY2018 and tailoring our actions in response. For it to be truly effective, we will update it every year with new understandings and improved techniques based on the success and learnings of our efforts, as well as factoring in numerous external, impactful issues. Our efforts will align to the satisfaction of our customers and our ability to fulfill our Vision, Mission, and Values. TriMet's management will use the Goals, Objectives, Measures, Targets, and Strategic Actions to set individual targets, define detailed objectives, and focus efforts at the individual, team, and department level with the overall strategic needs.

Annual updates will allow us to take on the future with a solid route map while retaining the flexibility to respond when things change.

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

- Enhancement of Bus Service with HB2017 funding
- Division Transit Project (DTP)
- Clean fuel bus strategy
- Safety Management System (SMS) and how it fosters our culture of safety
- Upcoming Annual Service Plans
- The challenge of regional growth, congestion, and advances in technology

We believe in a bright future for this region and we are committed to doing our part to make our community the best place to live in the country by providing valued transit service that is safe, dependable, and easy to use.





# Acronyms and Definitions

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

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

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

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

**DBE – Disadvantaged Business Enterprise** – Companies with ownership by socially or economically disadvantaged individual(s)

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

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

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

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

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

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

**FY – Fiscal Year** – The fiscal operating period used by TriMet and other public agencies in Oregon, which runs July 1 through June 30 of the following calendar year; e.g., FY2019 is from July 1, 2018, through June 30, 2019

**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** – Newly-enacted funding from the State of Oregon for transit that begins in FY2019

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

**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 current status in a given issue

**MOD – Mobility On Demand Sandbox** – A federal grant that TriMet is using to improve open source online trip planning and mapping that other transit agencies and transportation providers can also use. The new trip planner will integrate transit with other shared-use modes (e.g., ride sharing, ride-hailing, and bike share)

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

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

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

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

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

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

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

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

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

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

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

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

**Six Sigma™** – Management techniques and tools for improving procedures to greatly reduce the chance that an error or defect will occur

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

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

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

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

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

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

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

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

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

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