

**FY 24 Performance Evaluation
July 1, 2023, to June 30, 2024**

**Sam Desue, Jr.
General Manager**

OVERVIEW:

The Annual Performance Review documents the TriMet Board of Directors' assessment of the General Manager's performance from July 1, 2023, through June 30, 2024. This year's deliverables for the General Manager centered around several key areas, including the development and documentation of strategies to achieve TriMet's Vision 2030, advancing the multi-year Forward Together plan, enhancing system safety and presence, and engaging stakeholders and the community.

Additionally, the General Manager focused on recognizing and celebrating staff achievements, successfully delivering major projects, commissioning new vehicles, and maintaining solid financial stewardship and contracting performance. A continued emphasis on ridership recovery, growth, and improving the overall customer experience was also a critical focus during this period.

SUMMARY:

Sam Desue has successfully met the Board's objectives as General Manager for the business goals and deliverables outlined in the FY24 Work Plan. His accomplishments over the past year demonstrate his strong leadership in areas such as vision, accountability, collaboration, and adaptability while also emphasizing diversity as a key organizational strength. This brought TriMet a proud moment in being honored by APTA with the "Inclusive Collaboration Award" in September 2023.

ACCOMPLISHMENTS:

RIDERSHIP – *Safety and Security – Equitable Service – Experience*

TriMet's *Vision 2030*, incorporated into the FY2024 Business Plan, sets a bold new direction for transit growth in our region. Under the leadership of the General Manager, TriMet aligned strategic priorities across the Business Plan, Budget, Capital Improvement Program, and Service Plan to deliver on this vision.

The overarching goal is to provide 120 million annual rides by 2030. Growing ridership is more than just numbers—it means supporting a thriving economy and equitable access for all, reducing traffic congestion, expanding mobility and opportunity, partnering with our communities to shape the future, reducing emissions to support sustainability goals, and expanding transit funding possibilities to enhance service further.

For FY2024, the plan included an increase in service by June 2024, which required staffing at levels sufficient to meet these goals, which was the successful hiring of at least 390 bus operators. In addition, under the General Manager's leadership, central to rider experience was ensuring the safety and security of our riders. TriMet committed to providing a safer transit

environment by increasing staff presence on the system, and the goal was met to exceed 80% of our Safety and Security staffing targets by filling 350 positions across our safety and security teams.

At TriMet, millions of rides are provided annually, helping connect people to jobs, education, healthcare, and their communities. With *Vision 2030* incorporated into the Business Plan, Budget, and CIP, the goal is to make transit an even more integral part of everyday life for the people it serves. This focused growth will improve the quality of life for individuals and help create a more connected, sustainable region for everyone.

COMMUNITY – Relationships – Presence – Reputation

Engaging stakeholders and the community around core issues, including the budget, service changes, and critical infrastructure projects such as A Better Red Light Rail, the Interstate Bridge Replacement, and transit-oriented developments on key routes like 82nd Avenue and TV Highway ensure that the public, businesses, and communities have a voice in shaping the future of transit services. The anniversary of the FX2-Division bus line, which celebrated its one-year anniversary with the community, brought stories of appreciation for the cutting-edge technology of the experience that ‘fast’ was the way to go.”

The deliverables in the area of the community have been accomplished through TriMet’s engagement with six or more community and business partners to foster collaboration on key transit and equity projects. Additionally, at least one public engagement event in each district was held to involve communities directly, ensuring diverse perspectives were considered. Conducting three community focus groups around Vision 2030 goals and transit objectives ensured that the planning process included insights from diverse communities and stakeholders.

The Low-Income Fare Program exceeded the target by signing over 10,000 individuals for the low-income fare program, surpassing the original goal of 7,000. This demonstrates a strong commitment to making transit accessible and affordable to underserved populations.

The DEIA Plan was completed and implemented in FY2024, with initiatives like Employee Resource Groups (ERG) focusing on inclusive practices. These ERGs aim to enhance employee participation and representation, reflecting a commitment to building an inclusive workforce. Lastly, it cannot go without saying that TriMet lived up to its reputation during the 2-week January storm by delivering outstanding service to its community “100% TriMet at its best.”

PEOPLE– Recruitment/Retention – Training/Development performance – Total rewards/communication and career advancement

The General Manager’s commitment to leadership development and agency growth has made significant advancements in delivering its FY2024 goals for employee engagement, workforce development, and labor negotiations. The agency successfully executed major events that recognized and celebrated its workforce while completing key partnerships with educational institutions and preparing for succession planning. Stakeholder and union engagement was thorough, and substantial progress was made toward achieving negotiation readiness for the next Working and Wage Agreement.

In summary, the General Manager met his goals for the fiscal year, with most deliverables either complete or on track for completion. *Complete*. A partnership with PCC for diesel technology is

now in place, providing a pathway to maintenance department positions. *Complete*. Recruitment efforts are in place to onboard employees into entry-level positions, with clear pathways for career advancement into more senior roles. *Complete*. At least six meetings have been held with key stakeholders, including operations and maintenance departments, along with six or more meetings with ATU representatives in preparation for formal contract negotiations.

In Progress and On Track. Phase 1 of the succession planning program for executives is complete, and Phase 2 for director-level roles is currently in progress. *Development Complete and Implementation Underway*. The internship program is set to launch, offering students hands-on experience and potential career opportunities at TriMet. This demonstrates effective leadership and a clear focus on employee development and stakeholder collaboration.

INFRASTRUCTURE— Service improvements and expansion – Zero Emissions Buses – Information Technology – State of Good Repair

The general manager's leadership in meeting FY2024 infrastructure deliverables and targets has been a key driver of progress across several critical projects, including the A Better Red Line MAX Project, the deployment of battery electric buses (BEBs), and various state-of-good-repair projects. By balancing the complex demands of project management, resource allocation, and various key TriMet departments, the general manager has maintained a strong focus on timely delivery and efficient execution, ensuring that the organization meets its strategic goals. One example of this leadership is the successfully federally funded (FTA) A Better Red Line MAX Project, where substantial completion was achieved on schedule, including a huge community celebration with major stakeholders of various levels. This not only demonstrates the general manager's ability to manage large-scale, long-term infrastructure projects but also highlights the capacity to align the agency's teams and resources effectively, maintaining progress even amid challenges. The project remains on track for its FY2024 opening, reflecting the manager's commitment to adhering to timelines and ensuring project milestones are met. A BIG win!

Another key deliverable under the general manager's leadership was the acquisition and commissioning of 24 battery electric buses (BEBs), all of which were delivered by June 30, 2024. This achievement underscores a forward-thinking approach to sustainability and equity, as these buses were deployed on equity-focused transit lines. The ability to stay on schedule with such a cutting-edge initiative demonstrates the general manager's adaptability in managing new technology implementations, ensuring the organization is prepared to meet future transportation needs. An emphasis on operational efficiency complements this focus on sustainability, as the BEB commissioning was completed as planned, further cementing the organization's leadership in green transit solutions.

Additionally, the general manager has played a pivotal role in executing state of good repair projects, ensuring that critical maintenance and infrastructure upgrades are delivered on-time and within budget. The progress on projects such as the Sunset Transit Center elevator hoistway and the Washington Park emergency communications system, both of which are on track to meet their targets, demonstrates effective resource management. Moreover, the decision to defer the 148th MAX station rehabilitation in favor of higher-ridership stations exemplifies the general manager's ability to make strategic decisions that align with broader organizational goals, ensuring that resources are deployed where they will have the most impact.

Despite delays from the manufacturer, 19 new LRVs have been delivered, with adjustments made to the testing and service readiness schedules to keep the project on track. This ability to manage

external factors while maintaining momentum internally speaks to the general manager’s resilience and problem-solving skills. Clear communication with stakeholders and the Board has been instrumental in managing expectations and ensuring the project moves forward despite unforeseen setbacks. In summary, the general manager’s leadership in FY2024 has been characterized by a strategic vision, effective problem-solving, and a commitment to operational excellence, positioning the organization for continued success in the years ahead.

RESOURCES— Stewardship of exiting resources – Identifying new resources – Efficiencies

The general manager effectively aligned the organization's financial performance with the Strategic Financial Plan, meeting key financial policy elements such as Fiscal Policy, the Unrestricted Fund Balance & Contingency Policy, Debt Management Policy, and Fare Policy. The successful execution of the Capital Improvement Plan (CIP) and Pension Funding Plans further underscored the general manager’s leadership in maintaining fiscal discipline. In addition, the financial operations adhered to all the Strategic Financial Plan elements, culminating in achieving a significant target—obtaining an unmodified opinion on the annual financial statements, indicating strong financial health and transparency.

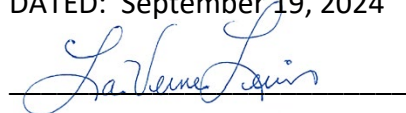
Moreover, the organization successfully adopted a balanced budget by June 30, 2024, highlighting sound financial management and strategic foresight. The development of the 5-year CIP provided a clear pathway for future infrastructure investment. At the same time, progress on the Resources and Community pillars of Vision 2030 helped identify funding opportunities to meet long-term goals. This comprehensive approach to fiscal planning and performance reflects the general manager's commitment to sustainable growth, strategic resource allocation, and the fulfillment of the organization's financial objectives

RECOMMENDED COMPENSATION

The General Manager’s performance from July 1, 2023, through June 30, 2024, demonstrated exceptional leadership across multiple key areas, aligning TriMet’s strategic goals with its Vision 2030 plan, enhancing safety and security, and the continued focus on the ridership experience. The aforementioned achievements highlight the General Manager's capacity to manage large-scale, multi-year projects while ensuring that sustainability and equity remain central to TriMet’s growth strategy. Overall, the Board recognized that the General Manager’s leadership ensured that most of the deliverables for FY2024 were either completed or on track, positioning TriMet for long-term success.

In light of these accomplishments, it is recommended that the Board approve a 6% merit and performance increase to the current salary of the General Manager to reflect the significant contributions and positive impact made during this review period. The General Manager’s current annual salary of \$428,480.00 would therefore increase to \$454,188.80 effective September 15, 2024.

DATED: September 19, 2024



Dr. LaVerne Lewis, TriMet Board President



Sam Desue, Jr., TriMet General Manager