

Date: November 4, 2013
To: TriMet Employees
From: Neil McFarlane
Subject: Operations Reorganization Announcement

Interim Deputy General Manager, Bob Nelson, has spent the last four months looking at ways to implement continuous improvements in the delivery of service to our customers. He continues to focus on Vehicle and System Reliability, Operator Support and Development, Service Delivery and Safety - all under our overarching goal to “Focus on the Customer.”

Work also moves ahead on the four recommendations set forth by consultant Barbara Ramirez Spencer in her report, *Measuring Up*, in the areas of the Operations Command Center, Right-Sizing of Bus Transportation Management, Frontline Employee Communications, and Bus Operator Training.

Clearly defined and measured accountability is critical as our system grows with the opening of the Portland-Milwaukie Light Rail line, the restoration of bus service, and our need to meet the new challenges associated with the aging of our many assets. It is essential that we exercise a vigilant approach to maintaining our vehicles and system infrastructure to ensure reliable service.

At the same time, technology advancements allow us the opportunity to better monitor and adjust our service in real time. We need an organizational structure that is nimble and innovative to support and sustain this evolving environment.

In response to these changing conditions, I have decided to create two new divisions – one for Maintenance and one for Transportation.

Transportation

With his retirement, Hayden Talbot’s position of Director of Transportation Operations will not be filled. Instead, beginning November 11, Shelly Lomax will become the Executive Director of Transportation reporting to the Interim Deputy General Manager. In addition to managing bus and rail transportation, Shelly will oversee the Command Center/Field Operations, LIFT, Commuter Rail, Operations Training and Service Delivery. Shelly’s broad and comprehensive experience across all of operations will be invaluable in moving forward. Her direct reports will include:

- Denis Van Dyke - In his position as Director, Operations Support, Denis will be responsible for the Command Center and Field Operations through Jay Jackson, and oversee

communication and SOP development for bus and rail through Rory Renfro. Denise Woodward, Operations Services Coordinator, will provide administrative support.

- Robert Romo, Lyle Pereira, Evelyn Warren, Don Allison – Transportation Managers
- David Trimble – Director of Business Programs including LIFT
- Allen Morgan – Manager, Transportation Operations Training
- Darren Morris – Director of Commuter Rail
- Ken Zatarain – Who, as noted below, will become the new Director of Service Delivery
- Jan Beaumont- Executive Administrator

Maintenance

Our maintenance staff must be diligent in identifying and implementing improvements in vehicle and system reliability, maintaining a state of good repair of all assets - especially aging assets - and leveraging data analysis to increase safety, ensure maintenance efficiency, better manage resources, and improve productivity. In the next few months, we will begin a search for an Executive Director of Maintenance. Meanwhile, Director of Maintenance Tom Nielsen will report to the Interim Deputy General Manager and assume responsibility for Facilities Management. Tom's direct reports include:

- Dan Blair – Manager of Rail Equipment Maintenance
- Robert Brooks – Manager of Maintenance Training and Procedures
- Mark Grove – Manager, Rail Equipment Maintenance Training and Engineering
- Greg Haley, Bob Johnson, Bob Seeley – Bus Maintenance Managers
- Rick Kindig – Manager of Maintenance of Way
- Rock Scott – Director of Facilities Management
- Lyn Jansen – Operations Coordinator
- Linda Joy – Bus Maintenance Administrator

Service Planning

To ensure all of our planning efforts are aligned, I am moving Service Planners Kerry Ayres Palanuk, Dan Marchand and Hannah Ritchie into the Policy and Planning Department led by Alan Lehto. Ken Zatarain will remain in Operations reporting to the Executive Director of Transportation in a new role as Director of Service Delivery. Ken and his staff will work in collaboration with Operations and Customer Service to improve schedule reliability, on-time performance and interactions with operators to help identify scheduling issues that may impede operator performance or diminish the quality of service to our customers. Our customers are the reason we're here. We need to deliver. Ken's direct reports include:

- James Hergert – Manager of Scheduling
- Mike Arronson – Manager of Workforce Utilization
- Nathan Banks – Manager of Scheduling Systems and Production

Operations Planning and Development

Dan Caufield, Director of Operations Planning and Development, will continue to report to the Interim Deputy General Manager and will also oversee Service Performance and Analysis and Rail Operations Planning. His focus will be on rigorous analysis of key performance indicators (KPI) accompanied by timely corrective action to meet our goals. Dan's direct reports include:

- Steve Callas – Manager of Service Performance and Analysis
- John Griffiths – Manager of Rail Operations Planning

To recap, the overall organizational structure under the Interim Deputy General Manager includes:

- Shelly Lomax - Executive Director of Transportation
- Tom Nielsen - Director of Maintenance
- Tim McHugh – Chief Technology Officer
- Dan Caufield - Director of Operations Planning and Development

While Safety and Security reports directly to the General Manager, I expect the Interim Deputy General Manager to work closely with the Safety Executive to embed safety as a value in all aspects of our operation.

Organizational Changes to Improve Accountability

I believe these organizational changes will position us to better account for our performance, accept responsibility for the results, and provide more transparent decision-making. A sharpened focus on accountability will help us manage our business efficiently and deliver improved outcomes for our customers, our employees, and our stakeholders.