



FY 2009

APTA BUSINESS PLAN
(July 1, 2008 – June 30, 2009)

Approved by the APTA Executive
Committee on May 3, 2008

TABLE OF CONTENTS

	Page
Introduction and APTA Administrative Department Overviews	
Introduction	ii
Executive Department	iv
Government Affairs Department	v
Policy Department	vi
Member Services Department	viii
Communications and Marketing Department	xi
Program Management and Educational Services Department	xiii
Finance and Administration Department	xvi
 <i>Meetings, Conferences and Workshops Project Details</i>	
Major Meetings and Conferences	1
Seminars and Workshops	2
 <i>New Projects Details</i>	
Goal One: Ridership	
Accessible Transportation Resource Kit: Partnership with Easter Seals Project ACTION	4
Bus Rapid Transit Implementation in Small Systems	5
Promotion of Waterborne Transit as an Operating Mode	6
Goal Two: Economic Vitality	
Transit Advertising Revenues Work Plan	7
Economic Revitalization Projects	8
Goal Three: Advocacy	
Authorization	9
New Congress and Administration Educational Activities	10
Greenhouse Gas/Energy Legislation	11
High Speed Rail Advocacy	12
Advocacy to Presidential Candidates	13
Collaborate with AASHTO to Enhance Transit-Specific Education Material for State Administrations	14
Positioning Transit to Help State and Local Governments Meet Petroleum Conservation and Greenhouse Gas Reduction Goals	15
Planning for Sustainability: Building Transit and MPO Partnerships	16
How Transit Helps Spawn Economic Health and Development-New Advocacy Reports	17
Goal Four: Image	
Multi-Media Grassroots Advocacy Outreach	18
Revamp Public Transportation.org	19
Positioning Public Transportation as “Green”	20
Public Service Announcement Campaign Implementation	21
Goal Five: People and Organizations	
Quick Guides-Online Resources	22
Rail Customer Service Challenge	23
International Best Practices and Outreach	24
<i>Passenger Transport</i> On-Line Strategy/Publications Mix	25
Research and Technology Web Site	26
Member Needs Assessment Survey: Professional Development Needs of Transit Employees	27
Develop a Professional Certification and Credentialing Program for the Transit Industry: Scoping Study	28
Transit Governing Boards Training Curriculum Project	29
Transit Board Members – Online Community	30
Goal Six: Safety and Security	
Developing Business Member Opportunities in Safety and Security	31
Commuter Rail Safety Training Program	32
Goal Seven: Association Development	
APTA Going Green	33
Web Services Improvement	34
Review APTA Statistical Reports	35
TransitVision 2050 Follow-Up	36
Enhanced Services for Small Transit Systems	37

AMERICAN PUBLIC TRANSPORTATION ASSOCIATION

FISCAL YEAR 2009 BUSINESS PLAN

VISION

Be the leading force in advancing public transportation.

MISSION

To strengthen and improve public transportation, APTA serves and leads its diverse membership through advocacy, innovation and information sharing.

CORE VALUES

Leadership
Integrity
Excellence
Diversity
Inclusiveness
Fairness and Equity
Teamwork
Professionalism
Accountability

APTA's FY 2009 Business Plan supports APTA's 2005-2009 Strategic Plan adopted in October 2004. The plan continues to focus our activities on the seven goals identified as priority areas in the five-year strategic plan.

RIDERSHIP...Improve services that support members' efforts to increase ridership and transportation choices.

ECONOMIC VITALITY...Increase services that support members' efforts to strengthen the economic vitality of the public transportation industry and the communities they serve.

ADVOCACY...Support and advance public transportation by influencing and educating decision-makers at the federal level and assisting APTA members in shaping state and local policies favorable to public transportation.

IMAGE...Improve the image of public transportation.

PEOPLE AND ORGANIZATIONS...Promote services to members that enhance the strengths and effectiveness of their organizations.

SAFETY AND SECURITY...Provide services, standards, and effective practices that create safe and secure environments for public transportation riders, workers, and communities.

ASSOCIATION DEVELOPMENT...Strengthen APTA to better serve its members.

The APTA Fiscal Year 2009 Business Plan is the fourth business plan developed under APTA's 2005-2009 Strategic Plan. The plan focuses on the key initiatives identified by the APTA Executive Committee in November, 2007. Those initiatives are: completion of APTA's Vision 2050 process, continuation of APTA's policy and strategy development for the next federal surface transportation program authorization, completion of preparations for a successful 2008 EXPO and annual meeting,

and APTA staff development. APTA's current theme, "Public Transportation: Wherever Life Takes You...Today and Tomorrow" is a strong message that has proven to resonate well with Americans and local, state and federal officials.

The APTA Vision 2050 process continues to be of utmost importance for our industry and the utilization of the internet as a means of communication has proved to be a successful means to gain input from the APTA membership, stakeholder organization and from the general public on the kind of America we foresee and how public transportation can be a central part of it. The second phase of this effort, framework for the future, is examining APTA's purpose and constituency to ensure APTA's governance and strategic plans align with that overall vision. APTA's legislative committee and the authorization task force continue to develop recommendations and strategy for the upcoming authorization bill and the authorization process. In preparation for EXPO 2008, staff and APTA trade show manager, National Trade Productions, developed an attendee marketing plan utilizing issued-based messaging and are encouraging utilization of the EXPO 2008 web site for attendee and exhibitor information. APTA continues its commitment to provide the best staff it can to support our members and the industry.

In addition to the above, the FY 2009 business plan includes a range of activities that offer the potential of delivering a significant return on investment for our industry and helping to create stronger, more efficient and effective member organizations. They include new Congress and administration education activities, grassroots advocacy programs, advocacy to presidential candidates, online resources guides, professional development needs of transit employees, transit governing board training curriculum project, and an accessible transportation resource kit among many other new projects.

The following narrative by each of APTA's administrative departments provides brief background information about each group, key ongoing activities and new programs for the FY 2009 APTA Business Plan and Budget. New program descriptions are organized by the seven goals of APTA's Strategic Plan.

APTA's administrative department descriptions (page iii-xvii) reflect the organizational restructuring and staff assignments made in February 2007.

APTA ADMINISTRATIVE DEPARTMENT OVERVIEWS

EXECUTIVE DEPARTMENT

The primary objectives of the executive office are to carry out the responsibilities of the presidency as outlined in the bylaws and activities as directed by the APTA Board of Directors and Executive Committee; coordinate and implement the FY 2009 business plan; and deliver a balanced budget. The department includes the office of chief counsel which provides legal, contractual and regulatory services to the association and coordinates the meetings of the APTA Board of Directors and Executive Committee. The chief counsel also organizes and runs the annual legal affairs seminar and the APTA nominating and election process. The vice president-strategy is also in the executive department assisting the president in planning and conducting the strategic activities of APTA. For FY 2009 this office includes 5 positions and a budget of \$1,497,000 representing 6 percent of the total APTA operating budget.

GOVERNMENT AFFAIRS DEPARTMENT

The government affairs department advocates APTA's interests in Washington - on the Hill, in the federal agencies, and among interest groups and coalitions - and communicates key legislative and regulatory information to APTA's members, working closely with APTA's Policy Department. The department develops and implements APTA's annual legislative conference. For FY 2009, this department includes 6 positions and a budget of \$2,457,000 representing 9 percent of the total APTA annual operating budget.

KEY ONGOING ACTIVITIES

Government Affairs and Related Activities

The department will continue its activities relating to the annual budget and appropriations processes for federal transit investment and security funding. The department coordinates and performs federal outreach efforts to build relationships and promote the transit industry with officials and staff on the Hill, in federal agencies and the White House.

FY 2009 PROPOSED BUSINESS PLAN PROJECTS

Authorization

With SAFETEA-LU expiring on September 30, 2009, the next authorization bill is coming up fast and APTA is developing its recommendations for Congress on that bill. (See page 9 for more details.)

New Congress and Administration Educational Activities

With the Presidential election campaigns already in high gear, APTA has surveyed the major campaigns for views on transit and transportation infrastructure investment. We will work to educate the candidates and the new administration on the importance and benefits of public transportation. Additionally, we will work with Members of Congress to ensure that they are aware of APTA's recommendations on the authorizing legislation that replaces SAFETEA-LU and the benefits of federal investment in transit. (See page 10 for more details.)

Greenhouse Gas/Energy Legislation

As Congress develops legislation that attempts to reduce greenhouse gas emissions and energy conservation, APTA will continue to work to ensure public transportation is included as a way to both reduce carbon emissions that result in global warming and reduce the nation's use of and dependence on oil imports. (See page 11 for more details.)

High Speed Rail Advocacy

As Congress continues to look for ways to address surface transportation needs and address environmental issues, APTA will seek to educate Congress and the new administration on the benefits of high-speed intercity passenger rail and the need for the federal government to invest in such service. (See page 12 for more details.)

POLICY DEPARTMENT

The policy department leads APTA's policy development, policy research and statistical research efforts working closely with APTA's Government Affairs Department. Such efforts involve federal agencies, Capitol Hill, the APTA membership, and various interest groups and coalitions. The department supports the state transit associations and APTA's State Affairs Committee and APTA's Policy and Planning Committee. For FY 2009, this department includes 9 positions and a budget of \$1,610,000 representing 6 percent of the total APTA annual operating budget.

KEY ONGOING ACTIVITIES

Policy Development, Policy Research, Statistical Research and Related Activities

The policy department will conduct policy research and develop policies on emerging issues affecting the public transit industry and which support APTA's vision and goals. The department will continue to advance grassroots programs such as the National Alliance of Public Transportation Advocates (NAPTA) and the Center for Transportation Excellence (CFTE). In FY 2009, the department will produce APTA's fourth sustainable development workshop and will work with AASHTO and CTAA in sponsoring the annual state public transit partnership conference. The department will also produce a number of APTA statistical reports including the Management Compensation Report, Vehicle Database, Fare Report, Infrastructure Report and Quarterly Ridership Reports.

FY 2009 PROPOSED BUSINESS PLAN PROJECTS

Review APTA Statistical Reports

APTA produces a number of significant data reports on a routine basis (e.g. quarterly ridership report, fare database, management compensation report.) In many cases the content of these reports has remained the same for a number of years despite significant changes in the industry. This project would both assess the value and content of existing reports, and identify potential data needs in the industry not yet met by APTA or other resources. (See page 35 for more details.)

Collaborate with AASHTO to Enhance Transit-Specific Education Material for State Administrations

State administrations are important transit industry partners, though our relationships vary across the country. Executive positions typically change with each gubernatorial administration. These changes provide APTA with the opportunity to work with AASHTO, the transit systems, business members and state associations, to educate those new to these positions on transit-friendly policies in a variety of states, expanding our partnerships and advocates. (See p. 14 for more details)

Positioning Transit to Help State and Local Governments Meet Petroleum Conservation and Greenhouse Gas Reduction Goals

A series of new research products quantify public transportation's contribution to petroleum conservation and greenhouse gas reduction. This information will be part of an advocacy strategy designed to convince state and local governments to include transit services in their plans, and to make public transportation a part of a sustainable future. Following are two specific ideas. First, included within the CLEAN Energy Act of 2007 (Creating Long-Term Energy Alternatives for the Nation Act of 2007), signed into law in December 2007, is a new Energy Efficiency and Conservation Block Grant program. The eligible entities for receipt of the funds are state and local

governments and Indian tribes and public transportation-oriented projects and strategies are clearly potentially eligible activities. In order to maximize the possibility that public transportation projects and strategies will be considered for funds appropriated under this authority, APTA will initiate outreach to the National Association of State Energy Officials (NASEO). Through such a successful collaborative effort, APTA can educate state energy officials on public transportation-oriented strategies, policy and research. Second, the Energy Independence and Security Act of 2007 established an Energy Efficiency and Conservation Block Grant program, wherein cities could receive funds to develop and implement programs to conserve energy used in transportation. (See page 15 for more details.)

Planning for Sustainability: Building Transit and MPO Partnerships

Under Safe, Accountable, Flexible Efficient Transportation Equity Act – A Legacy for Users (SAFETEA-LU) the metropolitan transportation planning process must provide for the consideration of projects and strategies that promote sustainability (i.e., projects and strategies that will protect and enhance the environment, promote energy conservation, improve the quality of life and promote consistency between transportation improvements and state and local planned growth and economic development patterns.) As more regions seek to reduce their carbon footprint, more regions will look to transportation plans that help them reach their goals. Transit will play a strategic role in this effort. Through surveys and interviews with a cross section of transit agencies in various size regions, the project will highlight how transit and MPOs are working together in the planning process to address sustainability practices. In addition, the best practices development could serve as part of a larger program to increase MPO involvement in APTA. (See page 16 for more details.)

TransitVision 2050 Follow-Up

This effort will identify and follow-through key steps to implement the compelling, unifying vision being crafted through the TransitVision 2050 process. The effort will focus on two distinct elements. First, we will need to understand how the vision for public transportation affects our overall strategy for funding, implementation, and partnerships. Second, based on the work and recommendations of the APTA Framework for the Future Task Force and with direction by the executive committee we will seek to appropriately structure the APTA organization to take on the challenges of today and tomorrow. These recommendations may result in changes to the APTA committee structure and the emphasis of staff activities. (See page 36 for more details.)

How Transit Helps Spawn Economic Health and Development—New Advocacy Reports

The link between transit investments and economic growth is often the number one factor in convincing state and local officials to invest in transit. This report would provide a useful document to make the case for transit as part of an economic development strategy. Tentatively titled *Fostering Economic Growth and Development through Public Transportation Investments*, this report would demonstrate that transit can and should be a central element to local economic development initiatives. This would be through a) land development stimulated by improved access; b) jobs creation; c) a more productive and efficient economy brought on by increased, sustainable transportation capacity. (See page 17 for more details.)

Economic Revitalization Project

Work to develop educational materials (such as case studies), and conduct sessions at conferences, meetings, seminars, etc., to encourage communities to work together to develop public transportation facilities in areas targeted for economic development, such as brownfields. This could not only help attract new businesses and potential employers into redevelopment areas by providing transportation options for potential workers but encourage additional investment by state and local governments and private developers in public transportation infrastructure. (See page 8 for more details.)

MEMBER SERVICES DEPARTMENT

The member services department work program is focused in a number of key action areas: meetings/workshops, technical services, standards, security, safety, applied research and technology, membership retention and recruitment plus support services for business members. APTA members actively participate in over 100 committees, subcommittees and task forces supported by the member services department. For FY 2009, the department includes 28 positions and a budget of \$9,159,000 representing 34 percent of the total APTA annual operating budget.

KEY ONGOING ACTIVITIES

Major Meetings, Conferences, Seminars and Workshops

APTA will produce five major conferences and fourteen workshops in FY09. (See pages 1 and 2 for more details.)

International Public Transportation EXPO 2008

APTA's international public transit EXPO is the world's largest and most comprehensive event serving the transit industry. It has grown from 60,000 net square feet to a projected 290,000 net square feet for San Diego, CA in 2008. Sales efforts are underway to achieve the goal of 290,000 net square feet.

International Outreach Program

The international program hired full time staff in FY08, enabling the program to expand outreach and services to members. Staff has improved capabilities to respond to members' international interests, is launching new initiatives, and strengthening ties with federal agencies involved in promoting transit interests abroad. Staff is aggressively promoting international participation in the 2008 EXPO and has engaged the business members' business development committee in this effort.

Operations and Technical Services (OTS)

OTS continues to expand the standards development program for the transit industry. A continuing objective of this program is to conduct a wide range of programs to educate the industry on the importance of implementing standards in their agencies and organizations. Another major thrust of the technical services group is the expansion of APTA's research and technology committee activities with implementation of the updated APTA Strategic Research Plan.

Commuter & Intercity Rail

Going forward, the commuter rail and the high speed and intercity rail committees will hold one or more joint meetings each year to capitalize on the synergies that exist between them.

In FY09 the high speed & intercity rail committee will act on the findings of a FY08-commissioned study on the net economic benefits of tax credit bonding to fund high speed/intercity passenger rail capital projects. This includes planning appropriate messages for Capitol Hill and the new administration.

Membership Retention and Recruitment

In FY 2009, in addition to the ongoing recruitment of new members including "green businesses", staff will aggressively recruit non-member EXPO exhibitors. The staff and member services committee will coordinate recruitment strategies throughout the year in addition to making personal visits on the EXPO floor. APTA's Ambassador Program (formerly called Mentoring) will continue to foster the sharing of information between industry peers through the new member

matching program coordinated by staff. APTA programs and services will be emphasized as part of the program's educational focus. Ambassador committee members and industry volunteers will share their unique perspectives and convey the results of their outreach to staff for follow up, as appropriate. Staff will continue to emphasize excellent customer services in their handling of member requests and through the prompt resolution of member issues. Additional enhancements to the membership database and e-web will be explored and implemented in order to offer members an easier resource and communication tool.

Safety & Security

The APTA Security Affairs Steering Committee has taken on the function as the Mass Transit Sector Security Coordinating Council and interfaces with the federal government on security policy issues including grants, training and technology. The security standards policy and planning committee continues to guide the activities of standards working groups that are engaged in a vigorous program to develop security standards for the industry. A number of peer reviews and safety audits will be conducted in FY 2009. Another major ongoing effort is the emergency response and preparedness program. Quality service initiatives are also ongoing, and a major initiative in this regard will be to explore the possibilities of establishing a continuous improvement program and recognition for industry achievements.

Business Member Participation

The business member small business committee hosts a resource room at each of the major APTA conferences to assist small business enterprises in maximizing the benefits of their APTA membership and identifying new business opportunities.

The business member outreach committee continues to encourage business members to become active participants in APTA. Quarterly publication of "*Business in Motion*" informs members about involvement opportunities and issues that affect them. In addition, member profile articles highlight how and why business members have become active in the association. The committee also works to encourage the participation of business members in APTA committees, to seek leadership positions in the association, and to become moderators and participants on APTA's conference programs.

FY 2009 PROPOSED BUSINESS PLAN PROJECTS

The following is a summary of new initiatives to be launched in the coming fiscal year. All of these new projects offer the potential of delivering a significant return on investment for our industry. The emphasis is on a business-like approach to serving members' interests, and the goal is to implement programs to make public transportation more efficient and effective. These programs are designed to assist members and the industry in becoming stronger and more successful.

Bus Rapid Transit (BRT) Implementation in Small Systems

BRT implementation is moving to the smaller transit agencies. However, these agencies have challenges in BRT implementation due to staffing resources and expertise. This project will encourage BRT implementation among these types of agencies by presenting BRT information in regional one or two day technical seminars around the U.S., with special emphasis on small system issues. This item is a carryover from the FY08 business plan. (See page 5 for more details.)

Promotion of Waterborne Transit as an Operating Mode

In FY08, APTA created the Waterborne Transit Committee. Efforts in the new fiscal year will focus on promoting waterborne transit as an operating mode; creating a forum for operators to network and share best practices; increase awareness at FTA of the value of public ferries; and

identify and pursue opportunities to increase public funding. (See page 6 for more details.)

Commuter Rail Safety Training Program

With a wave of retirements anticipated in the commuter rail industry and the launch of new service expected to double commuter rail operations in the country in ten years, there is a need to provide operational and institutional knowledge to ensure commuter rail systems will continue to improve the safety and security of service delivery. This project will form an industry partnership, seeking funding from the FRA and industry in-kind expertise to develop and implement a curriculum of safety and security courses for the commuter rail industry. The curriculum will be used to establish a level of competency for new employees entering the industry. (See page 32 for more details.)

Developing Business Member Opportunities in Safety and Security

In FY09 new opportunities will be made available for business members to participate in the development and implementation of safety and security programs, committees, audit programs and standards. This effort will include linking APTA's COMPS database (Catalog of Member Products and Services) to the APTA Safety Management Program to allow audited agencies immediate access to business members who can provide solutions to actionable audit findings. Additionally, business members will be actively recruited to expand their participation in joint development and testing of new services, products and technologies within the modal safety committees and in developing methods of communication and advocacy for safety and security within the business membership. (See page 31 for more details.)

International Best Practices and Outreach

Efforts in FY09 will focus on increasing members' exposure to international best practices. To affect this objective, the international program will work to increase international member and non-member participation in APTA events and in speaking roles at conferences and workshops, particularly during EXPO. Opportunities will be identified to improve and expand the dissemination of international business prospects to APTA members; and study missions will be initiated in a variety of industry disciplines. (See page 24 for more details.)

COMMUNICATIONS AND MARKETING DEPARTMENT

The communications and marketing department develops APTA's message, and communicates key transit industry information to its members, the media and the public. Furthermore, the department advances the mission and strategic goals of the association through marketing and communications. In conjunction with the government affairs department and the policy department, the department is also responsible for developing and implementing the research, communication and advocacy program. For FY 2009, the department includes 17 positions and a budget of \$6,345,000 representing 24 percent of the total APTA annual operating budget.

KEY ONGOING ACTIVITIES

Research, Communications and Advocacy

The department works closely with government affairs and policy in building support for public transportation policies and investment at the federal and local levels and improving perceptions and the image of the industry.

Media Relations

The department undertakes media relations efforts in support of APTA positions and activities.

Passenger Transport and Publications/Communications

A major ongoing activity is *Passenger Transport*: This includes development of content, sales of classified and display ads, graphics design and subscriptions. The President's Letter is also published weekly. Brochures and fact sheets are written and produced throughout the year.

Marketing and Sales

The department develops all materials to promote APTA's major meetings and produces the Dump the Pump program. It also oversees the marketing and communications committee and annual workshop. Besides overseeing APTA's web sites, the department plans to begin testing social media tactics, including blogs and exchanges.

Awards Programs

APTA's Annual Awards and AdWheel Awards programs are managed by the department.

TCRP Dissemination

APTA handles dissemination and promotion of Transit Cooperative Research Project (TCRP) reports.

FY 2009 PROPOSED BUSINESS PLAN PROJECTS

Transit Advertising Revenues Work Plan

Using the findings from the TCRP study, *Practical Measures to Increase Transit Industry Advertising*, a strategic communications plan will be developed. (See page 7 for more details.)

Authorization

As part of APTA's research, communication and advocacy strategy, outreach activities will move into high gear regarding authorization beginning in early 2009. (See page 9 for more details.)

Multi-Media Grassroots Advocacy Outreach

As part of APTA's research, communication and advocacy strategy, staff will explore developing a multi-media grassroots road show to support members' efforts and build support for public transportation at the local level. (See page 18 for more details.)

Positioning Public Transportation as "Green"

This project will bring together the many activities underway by APTA and the industry related to the twin issues of climate change and energy savings. (See page 20 for more details.)

Public Service Announcement (PSA) Campaign Implementation

APTA is working with 11 different colleges and universities to develop creative with a green message for public service announcements geared to those in their 20s. APTA will work to place these PSAs in key national and local markets as well as on the internet. (See page 21 for more details.)

Revamp Public Transportation.org

APTA will update and improve [www. public transportation.org](http://www.publictransportation.org) with the goal of making it the website for public transit information for the consumer. (See page 19 for more details)

Advocacy to Presidential Candidates

In conjunction with government affairs, a strategy will be developed and implemented to educate presidential candidates about public transportation. (See page 13 for more details.)

Quick Guides- Online Resources

Committees will select topics and develop "quick online guides" to help members easily find information and resources. (See page 22 for more details.)

Rail Customer Service Challenge

Building on the success of two customer service competitions – the APTA International Bus Rodeo Customer Service Challenge and the Call Center Challenge for telephone information specialists-- we will work this year to develop a similar competition at the rail rodeo. (See page 23 for more details.)

Passenger Transport On-Line Strategy/Publications Mix

Based on the recommendations of the publications survey, APTA will implement both a print and online strategy to continue to communicate industry information. (See page 25 for more details.)

PROGRAM MANAGEMENT AND EDUCATIONAL SERVICES DEPARTMENT

The program management and educational services department directs a strategic, comprehensive and diverse program management, educational services and workforce development program for American Public Transportation Association (APTA) members in a number of key action areas: overall management and direction for APTA's major meetings and several key workshops and seminars; promoting workforce development as part of APTA's programs, committees and activities while providing ongoing programmatic support to the industry; managing key education-oriented projects including the American Public Transportation Foundation (APTF) and Leadership APTA, and supporting select committees. The department manages a business plan designed to provide products and services that support APTA members and staff. For FY 2009, this department includes 8 positions and a budget of \$1,368,000 representing 5 percent of the total APTA annual operating budget.

KEY ONGOING ACTIVITIES

Program Management for Major Meetings, Conferences, Seminars and Workshop

APTA will produce conference programs for APTA's Annual Meeting & EXPO 2008, Bus & Paratransit Conference & International Bus Roadeo, Rail Conference, Transit CEOs Seminar, and Transit Board Members Seminar and Board Support Employee Development Workshop. APTA will produce five major conferences and fourteen workshops in FY 2009.

Program Management for Key Initiatives and Projects

APTA continues to support the coalition-building and stakeholder activities for the *Mobility Services for All Americans Initiative*, a federal initiative to increase mobility and accessibility for the transportation disadvantaged through technology. Staff continues to manage the development of universal accessibility standards as part of APTA's standards development program.

Involvement of Transit Board Members in Association Activities

APTA's Transit Board Members Committee continues to encourage member participation in all of the association's programs and activities. *Passenger Transport's* series, "Transit Board Members' Agenda Item," continues to feature articles written by transit board members on topics, including roles and responsibilities of board members; teen transit initiative; bus rapid transit; and the business aspects of transit. APTA's Vice Chair-Transit Board Members will continue to conduct quarterly national conference calls/web meetings with board members and board support staff. The purpose of this activity is to facilitate communications and professional development opportunities between committee meetings and the annual seminar.

Direct and Manage the Leadership APTA Program

APTA will conduct four sessions for the 2008-2009 class. Additionally, in FY 2009, the Leadership APTA committee will continue the process to conduct an assessment of the program. The assessment will: (1) include data collection on the program and its graduates; (2) identify the program's strengths and recognize areas for improvement; (3) begin to examine the growth and progress of graduates; and (4) identify strategies to broaden the program's outreach.

Technical Online Training and Curricula Development for the Rail Industry

This project continues the curricula development of online training courses and programs for maintenance and operations staff in the rail industry. These courses will be complemented by compiling, packaging and disseminating courseware developed by APTA members in these areas.

APTA will continue to support labor-management partnerships to develop training standards for technical operations and maintenance staff.

Member Support Services

APTA will provide professional support services to the following committees: conference program planning (including the technical conference subcommittees); transit board members; small operations, access, human resources, Leadership APTA, board support subcommittee and the American Public Transportation Foundation Board of Directors. Staff provides guidance and direction on APTA's management and programmatic activities related to ADA complementary paratransit, accessible transportation and senior mobility issues.

Educational Services

The department continues its ongoing workforce and professional development and educational services programs for the industry and APTA staff in several key areas: (1) managing a Learning Management System (LMS) to help APTA better manage, develop and offer its growing set of eLearning programs, webinars and resources to support member needs; (2) expanding the number of educational resource publications, materials, products and services related to board and transit management issues offered to the industry; (3) providing transit industry project managers (public and private sectors) with both existing and new project management resources and tools to help them refine their project management skills when leading and managing complex transit projects; (4) developing other leadership development programs in partnerships with other industry organizations; (5) developing a process and practical tools for assessing candidates for front-line supervisory positions within the transit industry; and (6) managing the American Public Transportation Foundation (APTF), including the APTF Transit Hall of Fame Scholarship Awards Program and continuing implementation of the vision and strategic plan adopted by the APTF Board of Directors.

Outreach to Generation X, Y and Millennium Workforce

APTA continues to address the transit industry's need to more effectively educate tomorrow's workforce about career opportunities within public transportation, particularly expanding outreach to colleges and university transportation centers and other targeted partners. In FY 2009, to engage students in national dialogues on these issues, staff will develop models for in-person, on-campus town meetings with the availability of some virtual broadcasts and subsequent online access.

APTA Staff Development: Excellence in Leadership and Staff Performance

APTA continues its ongoing staff development programs and initiatives to address internal organizational changes, industry challenges and issues that are important to APTA members and support the association's strategic plan.

FY 2009 PROPOSED BUSINESS PLAN PROJECTS

The program management and educational services department's proposed FY 2009 business plan projects are consistent with this year's theme, "Public Transportation: Wherever Life Takes You...Today and Tomorrow" and directly support services to members that enhance the strengths and effectiveness of their organizations. As part of APTA's workforce development activities, these projects continue to improve the knowledge and skills of employees and transit board members in the industry. These programs will enable members to improve the productivity, effectiveness and efficiency of operations and governance and public transportation investments.

Accessible Transportation Resource Kit: Partnership with Easter Seals Project ACTION

APTA will partner with Easter Seals Project ACTION to update the CD, *Resource Kit: Paratransit/Accessible Transportation*. The kit will include documents and resources from transit

agencies on best practices in operator training, travel training, paratransit management recruitment and retention and effective practices in universal design. (See page 4 for more details.)

Transit Governing Boards Training Curriculum Project

In partnership with the Eno Transportation Foundation and the National Transit Institute, APTA will design a leadership development curriculum for governing boards of transit agencies. (See page 29 for more details.)

Member Needs Assessment Survey – Professional Development Needs of Transit Employees

As a follow-up to APTA's report, *Workforce Development: Public Transportation's Blueprint for the 21st Century*, this project proposes to conduct an industry-wide survey to identify the professional development needs of staff within the transit industry and document updated baseline data and trends. (See page 27 for more details.)

Develop a Professional Certification and Credentialing Program for the Transit Industry: Scoping Study

This project will pursue development of a professional certification and credentialing program for the transit industry. A scoping study will be conducted to identify the range of certification and credentialing programs using a voluntary process through which credentials are granted to individuals meeting certain predetermined qualifications or standards. (See page 28 for more details.)

Transit Board Members – Online Community

This project establishes an online community for transit board members through *APTA's Online Communities and Learning Center* available on APTA's web site. This online community will provide transit board members an opportunity to communicate, share information and resources with fellow APTA members and other industry experts having areas of common interest. (See page 30 for more details.)

Enhanced Services for Small Transit Systems

APTA's Small Operations and Member Services Committees will review previous research and recommendations from earlier membership initiatives, and identify new opportunities, programs and services geared specifically to the needs of smaller transit systems. (See page 37 for more details.)

FINANCE AND ADMINISTRATION DEPARTMENT

The finance and administration department supports APTA's other departments in carrying out APTA's vision and mission. The department directs its resources on financial objectives, the development and management of the association's information technology systems, internal human resource matters and the day-to-day operations of the association's office space. For FY 2009, this department includes 20 staff members and a budget of \$4,337,000 representing 16 percent of the total APTA annual operating budget.

KEY ONGOING ACTIVITIES

Finance

The finance group coordinates the annual budget process in conjunction with the budget committee and supports the development of the business plan. The group provides day-to-day accounting services for the association including accounts payable, accounts receivable, membership dues, payroll, and monthly financial reporting with variance analysis. The group monitors financial policies of the organization in conjunction with budget review and financial reporting. The group also works directly with the project managers to coordinate quarterly billings of all federal grant activities. In addition, the finance group directs all investment activity for the organization as guided by APTA's Investment Policy. Finance provides staff support for the APTA Audit Committee, APTA Executive Committee and other committees and tasks forces as needed.

Human Resources

The human resources group develops and shapes internal organizational operations and policy. The group oversees and manages employee relations, including recruitment, orientation, and retention of employees, as well as civil rights issues. In addition, the group administers the association's compensation program, benefits programs, and business-related insurance policies. The group also provides, in coordination with the program management and educational services department, strategic direction for staff development as it relates to APTA's performance management system.

Administration

The administration group manages the day-to-day operations of the association's office headquarters and develops, coordinates, and monitors policies and activities affecting the internal operations of the association. This includes property management, procurement, travel services, telephone administration, printing, and mail services. The group continues to monitor, modify, and improve internal procedures and training to ensure the safety and security of APTA's staff and visitors.

Information Technology (IT)

The information technology group is responsible for directing, maintaining and improving the hardware and software operations within APTA as well as providing transit IT information to members. In FY 2008, the group completed the implementation of remote access for employees, the utilization of Microsoft Office 2007, oversight of the TransitVision 2050 web site and its integration with APTA's association management software (AMS), initiate phase one of the APTA web site redesign and new content management system and a host of other issues. In FY 2009, the IT group will continue to work with staff in enhancing the AMS system, continue to oversee necessary upgrades in staff hardware and software, ensure the maintenance and security of information technology is up-to-date and finalize an IT long-term strategic plan.

FY 2009 PROPOSED BUSINESS PLAN PROJECTS

Research and Technology Web Site

To create a section on the APTA web site that provides access to current content on existing and emerging technologies in the transit industry. (See page 26 for more details).

APTA Going Green

With the industry adopting practices and technologies to achieve a more sustainable environment, APTA will identify areas and practices that create and promote a green workplace at APTA's headquarters. (See page 33 for more details.)

Web Services Improvement

Working with staff and members to create a new web site and content management system, APTA will add features and improve the web site functionality. (See page 34 for more details.)

**Fiscal Year 2009 Business Plan
Meetings, Conferences and Workshops**

Title: Major Meetings & Conferences **Program Code:** 400 Series

Executive Committee

Liaison: All Members of the Executive Committee

Lead Staff: Lenay Gore; Pamela Boswell

Project Description: Produce five (5) first-class major meetings (legislative conference, bus and paratransit conference, light rail conference, rail transit conference and annual meeting and EXPO) with maximum attendance and member satisfaction while meeting all financial policies.

Staff Required: No new staff required.

Milestones:

1st Quarter: Plan and prepare for all upcoming major meetings.

2nd Quarter: Hold a successful annual meeting and EXPO in San Diego, CA, October 5-8, 2008.

3rd Quarter: Hold a successful legislative conference in Washington, D.C., March 8-10, 2009

4th Quarter: Hold a successful light rail conference in Los Angeles, CA, April 2009 (dates TBD); bus and paratransit conference in Seattle, WA, May 3-6, 2009 and rail conference in Chicago, IL, June 14-18, 2009.

Performance Indicators:

1. Achieve budgeted attendance for each of the five (5) major meetings
2. Exceed the average favorable satisfactory ratings normally received from attendees
3. Meet proposed financial policy regarding revenue and cost projection for each conference

Incremental Cost Impact: None

Other Strategic Goal Areas Supported: Ridership, Economic Vitality, Advocacy, Image, Safety and Security, Membership Development.

**Fiscal Year 2009 Business Plan
Meetings, Conferences and Workshops**

Title: Seminars and Workshops **Program Code:** 300 Series

Executive Committee

Liaison: All Members of the Executive Committee

Lead Staff: Lenay Gore; Pamela Boswell; Staff Advisors

Project Description: In addition to the five major conferences APTA will hold this fiscal year, fourteen (14) workshops/seminars/events are planned for the upcoming year. They are valuable and often indispensable educational and communication vehicles for members. The meetings and conventions area of the member services department handle all logistics for the workshops, including registration and budget control. (See Attachment A.)

Staff Required: No new staff required.

Milestones:

1st Quarter: Hold a successful APTA State Public Transit Partnerships Conference, Sustainable Development Workshop, Transit Board Members Seminar & Board Support Workshop, and Intermodal Operations Planning Workshop.

2nd Quarter: Hold a successful APTA Bus Technical, Maintenance & Procurement Workshop.

3rd Quarter: Hold a successful APTA Transit CEOs Seminar, Legal Affairs Seminar, Marketing & Communications Workshop and Fare Collection Workshop.

4th Quarter: Hold a successful APTA TransITech Workshop, International Bus Roadeo, BRT Conference, Risk Management Seminar and International Rail Rodeo.

Performance Indicators:

1. Achieve budgeted attendance
2. Receive favorable satisfaction ratings from participants
3. Meet proposed financial policy regarding revenue and cost projection for each meeting

Incremental Cost Impact: None

Other Strategic Goal Areas Supported: Ridership, Economic Vitality, Advocacy, Image, People and Organizations, Safety and Security.

FY 2009 Seminars & Workshops

Staff			Key
<u>Name of Seminar</u>	<u>Timeframe</u>	<u>Department Resp.</u>	<u>Contact</u>
State Public Transit Partnerships Conference	August 2008	Government Affairs	Weaver
Sustainable Development Workshop	July 2008	Government Affairs	Weaver
Transit Board Members Seminar & Board Support Workshop	July 2008	Program Management and Educational Services	Morsen
Intermodal Operations Planning	August 2008	Member Services	Stuart
Bus Technical, Maintenance & Procurement Workshop	October 2008	Member Services	Stuart/Gallagher
Transit CEOs Seminar	January 2009	Program Management and Educational Services	Morsen
Legal Affairs Seminar	February 2009	Executive Office	LaRusch
Marketing and Communications Workshop	February 2009	Communications and Marketing	Gonzalez
TransITech Workshop	February 2009	Member Services	Sanders
Fare Collection Workshop	March 2009	Member Services	Gallagher
International Bus Rodeo	May 2009	Member Services	Stuart
BRT Workshop	May 2009	Member Services	Stuart
Risk Management Seminar	June 2009	Member Services	Williams
International Rail Rodeo	June 2009	Member Services	Stuart

Fiscal Year 2009 Business Plan Ridership Strategic Goal

Title: Accessible Transportation Resource Kit:
Partnership with Easter Seals Project ACTION

Program Code: 519

Executive Committee

Liaison: Vice Chair-Bus & Paratransit Operations Joyce Olson Eleanor

Lead Staff: Lynne Morsen

Project Description: APTA produced the CD, *Resource Kit: Paratransit/Accessible Transportation* in July, 2001. The kit contains documents provided by 23 transit systems exemplifying current practices in eligibility, contracts, driver training, customer service, marketing, travel training, and other operational, policy, and procedural information. APTA's Access Committee members have proposed updating the resource kit, adding, for example, vehicle operator and management recruitment and retention, new APTA standards regarding call center service hold times and effective practices in universal design.

APTA will partner with Easter Seals Project ACTION (ESPA) who will help in evaluating materials that are currently available through its ESPA Clearinghouse – such as *Innovative Practices in Paratransit Service* – and its *Characteristics of ADA Paratransit Services (CAPS) in America Database*, and establishing how the updated CD kit will complement the published information.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Develop a comprehensive list of available materials through the Transit Cooperative Research Program, ESPA and members. Determine how the new CD resource kit complements information that is now available.

2nd Quarter: List the information that will be requested from paratransit and accessible transit service providers.

3rd Quarter: Request managers of paratransit and accessible services to supply electronic materials.

4th Quarter: Contract services with a producer of CDs to create the disks. Design the covers, write introductory materials. Produce the CD.

Performance Indicators:

1. Production of a list of available materials
2. Decision on how the CD will complement the available materials
3. List of materials to be requested
4. Requests sent to paratransit and accessible transit providers
5. Receipt and assembly of materials into a CD

Incremental Cost Impact: \$6,000 for CD production and temporary help.

Other Strategic Goal Areas Supported: People and Organizations

**Fiscal Year 2009 Business Plan
Ridership Strategic Goal**

Title: Bus Rapid Transit (BRT) Implementation in Small Systems

Program Code: 503

Executive Committee

Liaison: Vice Chair-Bus & Paratransit Operations Joyce Olson Eleanor
Vice Chair-Small Operations Hugh A. Mose

Lead Staff: Lurae Stuart

Project Description: BRT implementation is moving to the smaller transit agencies. These agencies have additional challenges in BRT implementation due to staffing resources. FTA is very interested in taking the lessons learned from larger system implementation to smaller systems. This project, in conjunction with some industry partners such as FTA, will encourage BRT implementation in small systems by presenting BRT information in regional one or two day technical seminars around the U.S. The regional seminars will address planning, implementation and lessons learned in BRT applications with specific emphasis on small system issues. Local officials involved in BRT applications such as city planners, traffic engineers, and city management would be encouraged to participate. Approximately 2-3 workshops will be held with expected attendance of 50-100 people at each workshop.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Hold a workshop that includes small transit agency participation to assist in identification of strategies that work in implementing BRT in small and mid-sized agencies.

2nd Quarter: Evaluate effectiveness of the first seminar and begin planning for a second seminar.

3rd Quarter: Hold the second regional seminar. Based on the responses of the first two workshops, plan small system specific topics into the APTA-TRB BRT Workshop planned for Seattle.

4th Quarter: Assess effectiveness and potential regional BRT applications. Have small and mid-size system specific sessions at the APTA – TRB BRT workshop in Seattle.

Performance Indicators:

1. Meeting target workshop attendance
2. Positive workshop evaluations of content and format
3. Additional requests for regional workshops (after the first)

Incremental Cost Impact: None. Registration fees and sponsorship will cover costs associated with the seminars.

Other Strategic Goal Areas Supported: Ridership, Economic Vitality, Image

**Fiscal Year 2009 Business Plan
Ridership Strategic Goal**

Title: Promotion of Waterborne Transit as an Operating Mode **Program Code:** 527

Executive Committee

Liaison: First Vice-Chair Beverly A. Scott

Lead Staff: Lurae Stuart, Tom Peacock

Project Description: Waterborne Transit Operations (WTO) are growing in the U.S. and Canada. APTA has taken the steps to set up a waterborne transit operations committee to promote waterborne transit operations by its members. This business plan item includes activities that encourage the incorporation of waterborne transit as a recognized mode of transit in their agencies. Activities will include sessions at appropriate APTA conferences, outreach and education to agencies contemplating the use of waterborne transit, coordination of UITP and CUTA waterborne transit operations activities, coordination with other associations that work with waterborne providers such as the Passenger Vehicles Association (PVA) and outreach to the Coast Guard, the regulatory agency that oversees waterborne activities.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Prepare to participate in the UITP waterborne transit operation workshop. Complete the system descriptions for current WTO committee members and finalize the outreach presentation about waterborne transit operations.

2nd Quarter: Participate with UITP in the workshop. Hold a WTO committee meeting at the APTA annual meeting and prepare a session on waterborne transit operations for the conference.

3rd Quarter: Participate with PVA in its annual conference, providing materials to promote WTO activities.

4th Quarter: Develop an updated list of all current, planned or contemplated waterborne transit operations in North America.

Performance Indicators:

1. A completed MOU to work with UTIP on the workshop
2. A completed and posted system description for each current WTO committee member
3. A completed and posted outreach presentation on waterborne transit operations
4. Attendance by some APTA WTO members at the UITP workshop
5. A list of current, planned, and contemplated waterborne transit operations in North America

Incremental Cost Impact: \$7,000 for travel and meeting costs.

Other Strategic Goal Areas Supported: People & Organizations

**Fiscal Year 2009 Business Plan
Economic Vitality Strategic Goal**

Title: Transit Advertising Revenues Work Plan **Program Code:** 600

Executive Committee

Liaison: Vice Chair-Marketing and Communications Thomas J. Costello

Lead Staff: Rose Sheridan, Jack Gonzalez

Project Description: TCRP Project B-33, Practical Measures to Increase Transit Industry Advertising, will be completed in summer 2008. The objective of this project is to recommend strategies to increase transit's share of total advertising expenditures by better understanding advertising decision makers' perceptions about transit advertising products and to develop a strategic responsive communications plan to improve those perceptions to increase revenue. APTA should be poised to begin implementation of the recommendations of the project's plan.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Review recommendations from TCRP report.

2nd Quarter: Develop plan based on recommendations and determine funding options.

3rd Quarter: Seek funding and implement plan if funding is available

4th Quarter: Continue implementation.

Performance Indicators:

1. Increase in transit advertising expenditures
2. Level of response from members

Incremental Cost Impact: None

Other Strategic Goal Areas Supported: Image

**Fiscal Year 2009 Business Plan
Economic Vitality Strategic Goal**

Title: Economic Revitalization Projects **Program Code:** 662

Executive Committee

Liaison: Vice Chair-Government Affairs Christopher P. Boylan

Lead Staff: Richard A. Weaver

Project Description: Work to develop educational materials (such as case studies), and conduct sessions at conferences, meetings, seminars, etc. to encourage communities to work together to develop public transportation facilities in areas targeted for economic development, such as brownfields. This could not only help attract new businesses and potential employers into redevelopment areas by providing transportation options for potential workers but encourage additional investment by state and local governments and private developers in public transportation infrastructure.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Survey communities that have successfully incorporated transit into economic redevelopment and revitalization projects.

2nd Quarter: Develop case studies and educational materials; outreach to APTA members through committees; identify opportunities for presentations/exhibits at conferences, seminars, etc.

3rd Quarter: Present materials at various venues.

4th Quarter: Present materials at various venues.

Performance Indicators:

1. Development of a publication on transit and its role in economic revitalization
2. Successful presentation of materials at multiple venues.
3. Identification of successful partnerships formed as a result of the outreach efforts

Incremental Cost Impact: Funded by RCA budget.

Other Strategic Goal Areas Supported: Ridership

**Fiscal Year 2009 Business Plan
Advocacy Strategic Goal**

Title: Authorization **Program Code:** 541, 660-663

Executive Committee

Liaison: Vice Chair-Government Affairs Christopher P. Boylan
Vice Chair- Marketing and Communication Thomas J. Costello

Lead Staff: Rob Healy, Rose Sheridan, Art Guzzetti

Project Description: Facilitate development of APTA recommendations on legislation authorizing the federal transit program and advocate those recommendations with Congress and administration. Develop and implement research, communications and advocacy (RCA) plan.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Continue to work with APTA Authorization Task Force and APTA Legislative Committee on development of recommendations for upcoming authorization bill. Develop RCA plan.

2nd Quarter: Finalize industry recommendations on upcoming authorization bill and publish recommendations that can be used with Congress, administration, and coalition partners.

3rd Quarter: Work with Congress, administration, and coalition partners in Washington, DC to advocate inclusion of APTA recommendations in legislative proposals. Implement RCA plan.

4th Quarter: Continue to work with Congress, administration, and coalition partners in Washington, DC to advocate inclusion of APTA recommendations in legislative proposals under development. Continue implementing RCA plan.

Performance Indicators:

1. Degree to which recommendations represent a coherent consensus of industry views and needs
2. Degree to which Congress and administration include APTA recommendations in legislative proposals
3. Degree to which members and supporters undertake activities to build support for stronger funding.

Incremental Cost Impact: Funded by RCA budget.

Other Strategic Goal Areas Supported: Economic Vitality, Image

**Fiscal Year 2009 Business Plan
Advocacy Strategic Goal**

Title: New Congress and Administration Educational Activities

Program Code: 541

Executive Committee

Liaison: Vice Chair-Government Affairs, Christopher P. Boylan

Lead Staff: Rob Healy

Project Description: Develop and implement plan to educate new members of Congress and the new administration on the federal transit program, the benefits of the federal transit program, and the needs and concerns of transit systems.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Conduct work with APTA membership to finalize recommendations on upcoming authorization of transit bill, which will serve as partial basis for educational activities.

2nd Quarter: Compile election results for Congress to target new members of Congress and send communication to those members introducing APTA.

3rd Quarter: Work with new members of Congress and administration, with emphasis on U.S. DOT, to educate them on how transit serves national goals. Prepare and distribute information on transit program, needs, and benefits to Congress and administration.

4th Quarter: Continue outreach and education efforts with Congress and administration officials.

Performance Indicators:

1. Degree to which we can reach new members of Congress and administration officials
2. Degree to which a quality informational packet can be prepared and distributed
3. Questions generated and contacts established with Congressional and administration officials
4. Degree to which transit authorization reflects APTA recommendations

Incremental Cost Impact: None

Other Strategic Goal Areas Supported: Economic Vitality

**Fiscal Year 2009 Business Plan
Advocacy Strategic Goal**

Title: Greenhouse Gas/Energy Legislation **Program Code:** 541

Executive Committee

Liaison: Vice Chair-Government Affairs Christopher P. Boylan

Lead Staff: Rob Healy

Project Description: Work to ensure that public transportation is recognized and used as part of any legislation that seeks to reduce greenhouse gas emissions, promote energy conservation, or reduce dependence on oil imports.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Continue to work with Congress on development of greenhouse gas legislation and educate congressional staff and members of Congress on transit's potential to reduce the growth of vehicle miles travelled. Work with congressional and presidential candidates to include transit in environmental and greenhouse gas policy.

2nd Quarter: Continue education efforts with Congress, administration, and coalition partners.

3rd Quarter: Work with Congress, administration, and coalition partners in Washington, DC to advocate inclusion of transit in legislative proposals.

4th Quarter: Continue to work with Congress, administration, and coalition partners in Washington, DC to advocate inclusion of transit in legislative proposals.

Performance Indicators:

1. Degree to which transit is included as solution to energy conservation and greenhouse gas problems in legislative proposals
2. Degree to which Congress, the administration, and coalition partners understand the benefits of using transit to address greenhouse gas and energy conservation goals

Incremental Cost Impact: None

Other Strategic Goal Areas Supported: Economic Vitality

**Fiscal Year 2009 Business Plan
Advocacy Strategic Goal**

Title: High Speed Rail Advocacy **Program Code:** 541

Executive Committee

Liaison: Vice Chair-Commuter and Intercity Rail David Solow
Vice Chair-Government Affairs Christopher P. Boylan

Lead Staff: Rob Healy

Project Description: Establish and implement a plan to educate congressional staff on the benefits and need for new federal investment in high-speed rail.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Make appointments to visit congressional staff and distribute information previously prepared on the benefits of intercity high-speed passenger rail service. Take advantage of opportunities to advance agenda in Amtrak legislation or other legislative vehicles.

2nd Quarter: Continue efforts to meet with and educate congressional staff on high-speed passenger rail.

3rd Quarter: Continue effort to educate staff in the new Congress and administration and seek legislative opportunities to establish funding and other incentives for such service.

4th Quarter: Continue ongoing activities.

Performance Indicators:

1. Degree to which provisions supporting agenda are included in Amtrak or other legislation
2. Degree to which legislative proposals are drafted or introduced that support high-speed rail agenda

Incremental Cost Impact: None.

Other Strategic Goal Areas Supported: Economic Vitality

**Fiscal Year 2009 Business Plan
Advocacy Strategic Goal**

Title: Advocacy to Presidential Candidates **Program Code:** 662

Executive Committee

Liaison: Vice Chair-Government Affairs Christopher P. Boylan
Vice Chair-Marketing and Communications Thomas J. Costello

Lead Staff: Rob Healy, Rose Sheridan

Project Description: As part of APTA’s research, communication and advocacy efforts, APTA will continue to reach out to presidential candidates. This will include briefing materials, a questionnaire on their positions on public transportation, working with the platform committees and meetings. We are also considering outreach at the democratic and republican conventions and will invite the candidates or their representatives to address the membership at the APTA Annual Meeting and EXPO in San Diego.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Outreach at the two conventions in Denver and Minneapolis. Publicize results of questionnaire.

2nd Quarter: Continue outreach until election in November. Hold session at Annual Meeting/EXPO.

3rd Quarter: Work with new administration’s transition team

4th Quarter:

Performance Indicators:

1. Positions on public transit by presidential candidates

Incremental Cost Impact: Funded by RCA budget.

Other Strategic Goal Areas Supported: Image, Economic Vitality

**Fiscal Year 2009 Business Plan
Advocacy Strategic Goal**

Title: Collaborate with AASHTO to Enhance Transit-Specific Education
Material for State Administrations **Program Code:** 662

Executive Committee

Liaison: Vice Chair-State Affairs Matthew O. Tucker

Lead Staff: Art Guzzetti

Project Description: State administrations are important transit industry partners, though our relationships vary across the country. Executive positions typically change with each gubernatorial administration. These changes provide APTA with the opportunity to work with AASHTO, the American Association of State Highway and Transportation Officials, and the transit systems, business members and state associations in each state, to educate those new to these positions on transit-friendly policies in a variety of states, expanding our partnerships and advocates. Concretely, we will seek to strengthen our collaboration with AASHTO on specific projects and products to reach out to new DOT executives in particular on the multi-modal approach that some states are now taking.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Develop project ideas with AASHTO, working in particular with its public transport committee.

2nd Quarter: Produce products and materials.

3rd Quarter: Disseminate material via AASHTO channels, especially its peer-to-peer communications from veteran CEOs to new CEOs.

4th Quarter: Survey to solicit feedback

Performance Indicators:

1. Improved relationships with state DOT executives.

Incremental Cost Impact: Funded by RCA budget.

Other Strategic Goal Areas Supported:

**Fiscal Year 2009 Business Plan
Advocacy Strategic Goal**

Title: Positioning Transit to Help State and Local Governments Meet Petroleum Conservation and Greenhouse Gas Reduction Goals **Program Code:** 581

Executive Committee

Liaison: Vice Chair-State Affairs Matthew O. Tucker

Lead Staff: Arthur L. Guzzetti; Richard A. Weaver

Project Description: A series of new research products quantify public transportation's contribution to petroleum conservation and greenhouse gas reduction, and have a practical use in evaluating the contribution of transit in a cap and trade program, auction or other program. This information will be part of an advocacy strategy designed to convince state and local governments to include transit services prominently in their local development plans and to recognize public transportation as an essential part of a sustainable future. Early in FY 2009 new information will be released which will quantify the value of transit investment for use with the Chicago Climate Exchange, the California Climate Registry, or other carbon trading markets. Further, new federal programs created under the CLEAN Energy Act of 2007 (Creating Long-Term Energy Alternatives for the Nation Act of 2007), and the Energy Independence and Security Act of 2007 created new programs that potentially give public transit providers the opportunity to obtain funds from states and cities to invest in energy efficient transportation. In order to maximize the possibility that public transportation projects and strategies will be considered for funds appropriated under this authority, APTA will initiate outreach to the National Association of State Energy Officials (NASEO) and with the U.S. Conference of Mayors to position transit for inclusion in the locally adopted programs, and will advise APTA members as to appropriate steps they should take.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Complete the work under the Greenhouse Gas/Carbon Trading project. Convey to governmental organizations, associations, thought leaders, etc, the new research showing the benefits of increased public transportation. Initiate meeting/conference call between APTA and NASEO representatives.

2nd Quarter: Attend and present at NASEO meetings.

3rd Quarter: Invite NASEO representatives to APTA State Affairs Meeting.

4th Quarter: Invite NASEO representatives to APTA Annual Meeting.

Performance Indicators:

1. Degree to which transit is recognized in carbon trading programs
2. Degree to which transit is recognized in state and local energy block grant programs

Incremental Cost Impact: None

Other Strategic Goal Areas Supported: Economic Vitality

**Fiscal Year 2009 Business Plan
Advocacy Strategic Goal**

Title: Planning for Sustainability: Building Transit and MPO Partnerships **Program Code:** 581

Executive Committee

Liaison: Vice Chair-Government Affairs Christopher P. Boylan

Lead Staff: Richard A. Weaver

Project Description: Under SAFETEA-LU, the metropolitan transportation planning process must provide for the consideration of projects and strategies that promote sustainability, i.e., projects and strategies that will protect and enhance the environment, promote energy conservation, improve the quality of life and promote consistency between transportation improvements and state and local planned growth and economic development patterns. As more regions seek to reduce their carbon footprint, more regions will look to transportation plans that help them reach their goals. Transit will play a strategic role in this effort. Through surveys and interviews with cross sections of transit agencies in various size regions, the project will highlight how transit and MPOs are working together in the planning process to address sustainability practices. In addition, the best practices development could serve as part of a larger program to increase MPO involvement in APTA.

New Staff Required: No new staff required.

Milestones:

1st Quarter: In partnership with Association of Metropolitan Planning Organizations (AMPO), create a transit/MPO working group to serve as an oversight group to develop a survey instrument and interview questions. In addition, the group will identify transit and MPOs that are developing transportation plans and programs that integrate transit as a strategy in sustainability goals.

2nd Quarter: Test survey instrument to obtain details on the process.

3rd Quarter: Survey six to ten MPOs and transit systems. Develop draft case studies on best practices.

4th Quarter: Finalize report on best practices.

Performance Indicators:

1. Extent to which transit and MPOs participate in the working group
2. Extent to new MPOs join APTA and existing MPOs participate in the project
3. Development of at least six to ten best practice case studies.

Incremental Cost Impact: FTA will fund \$25,000 along with supplemental funds through the FTA/FHWA Transportation Planning Capacity Building Program.

Other Strategic Goal Areas Supported: Image; Association Development.

**Fiscal Year 2009 Business Plan
Advocacy Strategic Goal**

Title: How Transit Helps Spawn Economic Health and Development
-New Advocacy Reports

Program Code: 581

Executive Committee

Liaison: Vice Chair-Government Affairs Christopher P. Boylan

Lead Staff: Arthur L. Guzzetti

Project Description: The link between transit investments and economic growth is often the number one factor in convincing state and local officials to invest in transit. A report will be produced to provide a useful reference for making the case for transit as part of an economic development strategy. Tentatively titled *Fostering Economic Growth and Development through Public Transportation Investments*, this report would demonstrate that transit can and should be a central element to local economic development initiatives, and would include facts and anecdotal information that could be used in testimony and in federal, state and local advocacy efforts. Benefits would accrue through a) land development stimulated by improved access; b) jobs creation; c) a more productive and efficient economy brought on by increased, sustainable transportation capacity; d) connecting people to jobs and jobs with people; e) making all transportation systems move efficiently.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Award consultant contract.

2nd Quarter: Oversee development of the report.

3rd Quarter: Distribute report at 2009 APTA Legislative Conference.

4th Quarter: Continue to publicize and promote the report.

Performance Indicators:

1. Degree to which the report is referenced in testimony, local advocacy efforts, etc.

Incremental Cost Impact: Funded by BMBG activity fund.

Other Strategic Goal Areas Supported: Ridership, Economic Vitality

**Fiscal Year 2009 Business Plan
Image Strategic Goal**

Title: Multi-Media Grassroots Advocacy Outreach **Program Code:** 660-663

Executive Committee

Liaison: Vice Chair-Marketing and Communications Thomas J. Costello
Vice Chair-Government Affairs Christopher P. Boylan

Lead Staff: Rose Sheridan, Art Guzzetti, Mantill Williams

Project Description: APTA is exploring contracting with a vendor who is developing a program that is a multi-media road show, called Move America Now, to provide inspiration and information about the role public transportation plays in the quality of life of local communities. This will result in a program that will be the “Inconvenient Truth” for transit. The program has two major goals. First to “inoculate” communities against attacks from anti-transit interests and second to help communities keep projects in the federal pipeline through maintaining support for local and state match. The program consists of a multi-media road show to include multi-media rear projection portable sets with pre-produced scripts, video clips, images, graphics and music. The messages will include discussion of the positive benefits of transit with an emphasis on issues such as the environment, congestion and providing mobility for all.

New Staff Required: No new staff required.

Milestones:

- 1st Quarter:** Lay out scope of project and garner necessary approvals.
- 2nd Quarter:** Require vendor to demonstrate financial viability of project.
- 3rd Quarter:** After approvals, begin to build messages and strategy to target specific cities.
- 4th Quarter:** Build storyboards, video clips, and final set design and finalize presentation. Schedule launch in first community.

Performance Indicators:

- 1. Project meets APTA’s satisfaction regarding content and financial approval
- 2. Program concepts translate through storyboards, video clips, etc.
- 3. Communities/APTA members embrace and schedule use of program

Incremental Cost Impact: Funded by RCA budget and outside sources.

Other Strategic Goal Areas Supported: Advocacy

**Fiscal Year 2009 Business Plan
Image Strategic Goal**

Title: Revamp Public Transportation.org **Program Code:** 661

Executive Committee

Liaison: Vice Chair-Marketing and Communications Thomas J. Costello

Lead Staff: Mantill Williams, Mark Neuville

Project Description: Revamp the public transportation.org web site by improving the look, content and adding improved technology such as video clips and other important user friendly elements. The goal is to make the web site the “source” for public transit information for the general public.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Develop revision plan and seek approvals.

2nd Quarter: Implement new design, graphics, and content.

3rd Quarter: Improve video clip capability and other technical functionalities.

4th Quarter: Launch new site and promote to users, members and industry.

Performance Indicators:

1. Improved content, functionality and appearance of the site
2. Increase in number of visitors to site

Incremental Cost Impact: Funded by RCA budget.

Other Strategic Goal Areas Supported: Advocacy

**Fiscal Year 2009 Business Plan
Image Strategic Goal**

Title: Positioning Public Transportation as “Green” **Program Code:** 660-663

Executive Committee

Liaison: Vice Chair-Marketing and Communications Thomas J. Costello

Lead Staff: Rose Sheridan, Art Guzzetti, Rob Healy, Mantill Williams, Virginia Miller

Project Description: This project will spotlight and highlight ways to position public transportation as a key solution to reducing the impact of climate change and making America energy independent. Many activities are underway or are being developed throughout the industry and at APTA related to the twin issues of climate change and energy savings. Key stakeholders as well as the general public will be targeted. For example, under the area of workforce development, public transit jobs should be considered “green collar” jobs and the transit commuter benefit program is a way for businesses to support the environment. We will look for opportunities and issues throughout the year to make the connection, including the APTA Annual Meeting and EXPO. We will continue to link with Earth Day and Dump the Pump, and also consider bringing back the Best Workplaces for Commuters program with a green message.

New Staff Required: No new staff required.

Milestones:

- 1st Quarter:** Identify opportunities and develop plan of action.
- 2nd Quarter:** Highlight activities at EXPO. Spotlight information on web sites.
- 3rd Quarter:** Implement plan.
- 4th Quarter:** Continue to implement. Evaluate.

Performance Indicators:

1. Number of programs highlighted
2. Feedback from members
3. Number of media mentions.

Incremental Cost Impact: Funded by RCA budget.

Other Strategic Goal Areas Supported: Ridership, Economic Vitality, Advocacy, People and Organizations

**Fiscal Year 2009 Business Plan
Image Strategic Goal**

Title: Public Service Announcement (PSA) Campaign Implementation **Program Code:** 661

Executive Committee

Liaison: Vice Chair-Marketing and Communications Thomas J. Costello

Lead Staff: Mantill Williams

Project Description: APTA worked with 11 different colleges and universities to develop creative for public service announcement during its “Green Means Go” nationwide campus competition. APTA will work with a vendor as well as local transit agencies in placing the winning PSAs in key national and local markets as well as social media outlets.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Select specific markets and appropriate award winning PSAs. Complete strategic outreach plan. Produce PSAs, recruit vendor, and garner support of transit agencies to help place PSAs.

2nd Quarter: Place PSAs in key markets and work with transit agencies in placing PSAs.

3rd Quarter: Monitor success of placement and continue to place PSAs in key markets.

4th Quarter: Ongoing placement and monitor success.

Performance Indicators:

1. Monitor use of PSA’s by transit agencies
2. Monitor number of placements and impressions received after outreach placement effort

Incremental Cost Impact: Funded by RCA budget.

Other Strategic Goal Areas Supported: Advocacy

**Fiscal Year 2009 Business Plan
People and Organizations Strategic Goal**

Title: Quick Guides- Online Resources **Program Code:** 600

Executive Committee

Liaison: Vice Chair-Marketing and Communications Thomas J. Costello
All Vice Chairs

Lead Staff: Rose Sheridan, Pamela Boswell, Kathy Waters; all staff advisors

Project Description: The APTA member survey and the publications survey identified that members would like more information on best practices in the various function areas of the industry. Each committee will be asked to select and develop a guide to available resources in one area that is pertinent to the committee. The guide will include specific case studies as well as identify other resources, such as TCRP reports and articles. For example, the Marketing and Communications Committee will complete an online guide that will focus on ways to attract riders to make public transit use a life-style choice. The resource guides will be included on www.apta.com and will be the basis for articles in *Passenger Transport* and other publications as well as for sessions at workshops.

New Staff Required: No new staff required.

Milestones:

- 1st Quarter:** Each committee selects a topic for the best practices.
- 2nd Quarter:** Research topic and select case studies.
- 3rd Quarter:** Continue research and develop resource guides.
- 4th Quarter:** Complete guides and publicize.

Performance Indicators:

1. Resource guides completed and placed on web
2. Feedback from members
3. Number of members who use resource guides

Incremental Cost Impact: None

Other Strategic Goal Areas Supported: Ridership, Economic Vitality, Safety and Security

**Fiscal Year 2009 Business Plan
People and Organizations Strategic Goal**

Title: Rail Customer Service Challenge **Program Code:** 600

Executive Committee

Liaison: Vice Chair-Marketing and Communications Thomas J. Costello
Vice Chair-Rail Transit Gary C. Thomas
Vice Chair-Commuter and Intercity Rail David Solow

Lead Staff: Jack Gonzalez

Project Description: Currently, APTA produces two successful customer service competitions -- the International Bus Roadeo Customer Service Challenge (bus operators) and the Call Center Challenge (telephone information specialists). The marketing and communication committee and international rail rodeo committee will work together to develop a new competition to test the skills of rail transit frontline employees. At this live event held in conjunction with APTA's Rail Conference, contestants will be presented with a series of real life customer service scenarios and be judged by a panel of transit industry experts on how well they resolved each situation. This event will benefit the transit industry in two ways. First, it will recognize the valuable work of these frontline rail employees. Additionally, the event will raise the level of awareness of the importance of customer service to the transit industry.

New Staff Required: No new staff required.

Milestones:

- 1st Quarter:** Begin planning for event.
- 2nd Quarter:** Hire a production company to develop theme and handle on-site technical aspects.
- 3rd Quarter:** Solicit and vet contestant nominations.
- 4th Quarter:** Hold event at APTA Rail Conference in June 2009.

Performance Indicators:

1. Number of contestant nominations
2. Increased awareness of the importance of rail transit station managers within the transit industry
3. Number of transit systems that implement rail customer service challenges at local level

Incremental Cost Impact: \$12,000 for professional services.

Other Strategic Goal Areas Supported: Ridership, Image

**Fiscal Year 2009 Business Plan
People and Organizations Strategic Goal**

Title: International Best Practices and Outreach **Program Code:** 529

Executive Committee

Liaison: First Vice Chair-Beverly A. Scott

Lead Staff: Jessica Bechir

Project Description: The new international efforts will build on APTA's current activities in the areas of international participation, international study missions and networking activities, and business development. Key aspects of the best practices and outreach effort include increased level of international members and non-members attending APTA events and speaking at conferences and workshops, increased staff-to-staff contact with international associations, improved systems of disseminating international business opportunities to members, and coordination with cooperating international associations regarding briefings, meeting participation, and delegation visits.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Finalize international delegation recruitment for 2008 APTA EXPO/Annual Meeting. Finalize and execute one study mission. Public Private Partnership Workshop in Lyon, France with FTA and French Embassy.

2nd Quarter: Represent APTA at international associations' annual meetings and promote APTA member attendance at meetings and other networking opportunities. Plan and promote upcoming study mission in next quarter.

3rd Quarter: Plan and execute one study mission. Plan and promote upcoming study mission in next quarter. Promote FTA international activities to members.

4th Quarter: Plan and execute one study mission. Attend and promote member attendance and exposition at UITP World Congress.

Performance Indicators:

1. Work with conference specific staff to increase international participation and speakers at EXPO, annual meeting, and major conferences
2. Increase number of study missions, networking activities, and international programs available to members
3. Regular dissemination of international business opportunities to business members (reports at all conferences attended by business members and through emails)
4. Quarterly international-focused articles in *Passenger Transport*

Incremental Cost Impact: \$5,000 travel costs for international speakers.

Other Strategic Goal Areas Supported: Economic Vitality, Association Development

**Fiscal Year 2009 Business Plan
People and Organization Strategic Goal**

Title: *Passenger Transport* On-Line Strategy/Publications Mix

Program Code: 632

Executive Committee

Liaison: Vice Chair-Marketing and Communications Thomas J. Costello

Lead Staff: Rose Sheridan, Kathy Golden, Jack Gonzalez, Susan Berlin

Project Description: Last January, APTA conducted a comprehensive member survey of more than 6,000 members. This was followed up with a more focused survey and assessment of communications and publications. APTA's communications and Passenger Transport continued to be rated highly in importance and effectiveness. Based on the survey, APTA plans to make strategic changes to its publications mix and delivery. APTA's web site will be re-designed to incorporate more options and to improve usability. An on-line version of *Passenger Transport* will augment the print version. Also recommended were changes to the overall publications mix, content of the publications and ways to increase revenue.

New Staff Required: None.

Milestones:

1st Quarter: Begin producing an on-line *Passenger Transport*. Begin implementing other recommendations.

2nd Quarter: Initiate and meet with advisory committee at annual meeting. Solicit outreach and feedback from readers.

3rd Quarter: Continue implementation of recommendations

4th Quarter: Evaluate and continue refining publications and delivery.

Performance Indicators:

1. PT delivers timely, comprehensive news
2. PT advances goals of APTA and the industry
3. PT continues to be valuable and visible branded resource to members
4. PT is seen and read by decision makers
5. PT continues to be financially viable

Incremental Cost Impact: \$43,000

Other Strategic Goal Areas Supported: Association Development, Image

**Fiscal Year 2009 Business Plan
People and Organizations Strategic Goal**

Title: Research and Technology Web Site **Program Code:** 828

Executive Committee

Liaison: Vice Chair-Research and Technology Linda Bohlinger

Lead Staff: Lou Sanders, Jeff Popovich

Project Description: Create a section on the APTA web site that will include ways for members to have access to content related to emerging or existing technologies. The content to be provided will be in the form of white papers, presentations, flash demonstrations, etc. The site will also allow transit CEOs, transit board members and interested committees to share resources, provide sample policies and procedures and provide for connections to discussion forums.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Begin scoping project and perform surveys of eligible members to explore the content they would like to have available on the site.

2nd Quarter: Investigate existing projects related to APTA's website redesign to determine if the new design and capabilities will provide a vehicle for the dissemination and discussion of emerging and existing technologies.

3rd Quarter: Investigate related initiatives (TCRP, Volpe Center, etc.) to determine if duplication exists.

4th Quarter: Determine the resource requirements and other sources of information required to populate the content and disseminate the information.

Performance Indicators:

1. Design needs and elements are determined
2. Resource requirements are established

Incremental Cost Impact: None

Other Strategic Goal Areas Supported: Association Development

**Fiscal Year 2009 Business Plan
People and Organizations Strategic Goal**

Title: Member Needs Assessment Survey – Professional Development
Needs of Transit Employees

Program Code: 522

Executive Committee

Liaison: Vice Chair-Human Resources Jeanne Krieg

Lead Staff: Pamela Boswell, Joseph Niegoski

Project Description: As a follow-up to APTA’s report, *Workforce Development: Public Transportation’s Blueprint for the 21st Century* released in 2001, this project proposes to conduct an industry-wide survey to identify the professional development needs of staff within the transit industry. This survey would look at a broad range of staff roles at all levels to help identify priority industry-wide professional development/training needs and gaps, both short and long term. The survey results provide the industry a documented up-to-date baseline of the industry’s greatest professional development/training/programmatic and resource needs.

Using the results and findings of this initial survey and implementation of its recommendations, APTA would plan to conduct a comprehensive workforce development re-assessment in 2009-2010. To accomplish this re-assessment, APTA would plan to submit a formal proposal to Transit Cooperative Research Program for funding support for this comprehensive research project. The latter comprehensive program would include in-depth research, interviews, web-based resources, information exchanges, focus groups and listening sessions, surveys, and other means to address priority issues and challenges and recommended approaches and solutions.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Hire market research firm and design survey.

2nd Quarter: Conduct survey.

3rd Quarter: Compile and analyze survey results.

4th Quarter: Develop action plan based on results.

Performance Indicators:

1. Level of member response to survey
2. Improved understand of members’ needs
3. Ability to proceed with planned in-depth comprehensive research project

Incremental Cost Impact: \$20,000 for professional services.

Other Strategic Goal Areas Supported: Association Development

**Fiscal Year 2009 Business Plan
People and Organizations Strategic Goal**

Title: Develop a Professional Certification and Credentialing Program for the Transit Industry: Scoping Study

Program Code: 543

Executive Committee

Liaison: Vice Chair-Human Resources Jeanne Krieg

Lead Staff: Pamela Boswell; Joseph Niegowski

Project Description: A growing trend among professional and trade associations is the development of credentialing programs intended to elevate the profession, establish standards of professional practice, and help members address government regulation. According to APTA's 2007 Member Needs Assessment Survey, the availability of professional development certification and credentialing was cited as the number one service members would like to see the association offer as a benefit. This project will pursue development of a professional certification and credentialing program for the transit industry. The first step in the process is to conduct a scoping study with the following objectives: (1) identify information on the range of voluntary professional certification and credentialing programs; (2) develop strategic and business plans; and (3) conduct market analysis and research to guide the development of a program for the transit industry. APTA has received \$75,000 in funding under the Transit Cooperative Research Program J-6 "Quick Response for Special Needs" Program for the scoping study.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Establish an industry task force (including stakeholders) to help guide the scoping study. Retain consultant services.

2nd Quarter: Consultant completes literature reviews, develops a draft questionnaire; conducts interviews; and begins development of draft strategic plan.

3rd Quarter: Consultant prepares draft report of initial findings and begins development of business plan, including market analysis.

4th Quarter: Final report including recommendations and next steps is completed.

Performance Indicators:

1. Industry consensus on need for the program
2. Increased opportunities for Transit CEOs to receive industry recognition

Incremental Cost Impact: None. Project contingent on TCRP funding.

Other Strategic Goal Areas Supported: Ridership, Economic Vitality, Image, Association Development

**Fiscal Year 2009 Business Plan
People and Organizations Strategic Goal**

Title: Transit Governing Boards Training Curriculum Project **Program Code:** 504

Executive Committee

Liaison: Vice Chair-Transit Board Members Flora M. Castillo

Lead Staff: Pamela Boswell, Lynne Morsen

Project Description: In partnership with the Eno Transportation Foundation and National Transit Institute, APTA will design a leadership development curriculum for governing boards of transit agencies. The curriculum will be developed into a leadership training course for transit governing board members. Phase I of the project, including identification of an expert panel, comprised of transit board members, transit CEOs and private sector partners to guide the process, conducting industry interviews and completing the needs assessment, will be completed in Fiscal Year 2008. The anticipated delivery of the training program will be the third quarter of Fiscal Year 2009.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Design a comprehensive curriculum/training plan.

2nd Quarter: Develop a transit governing board development program to be delivered by the Eno Foundation.

3rd Quarter: Deliver transit governing boards training program curriculum and course.

4th Quarter: Determine schedule of course offerings and other next steps.

Performance Indicators:

1. Increased opportunities for transit board members to improve their oversight skills and knowledge
2. Increased member services that enhance the strengths and effectiveness of their organizations

Incremental Cost Impact: None. The program development costs will be shared by the Eno Transportation Foundation and the National Transit Institute.

Other Strategic Goal Areas Supported: Advocacy, Association Development

**Fiscal Year 2009 Business Plan
People and Organizations Strategic Goal**

Title: Transit Board Members – Online Communities **Program Code:** 504

Executive Committee

Liaison: Vice Chair-Transit Board Members Flora M. Castillo

Lead Staff: Lynne Morsen

Project Description: Establish an online community for transit board members through *APTA's Online Communities and Learning Center* available on APTA's web site. This center provides members the opportunity to communicate, share information and resources online with fellow APTA members and transit industry experts having areas of common interest. Several segments of our membership, including classes of Leadership APTA, human resources committee, safety and security committees and a community for coalition-building activities to improve mobility and accessibility through the use of technology, have established communities. Transit board members will be able to share resources on policies and procedures and participate in discussion forums. This online community will provide information relevant to transit boards of directors, including findings from APTA's BoardOrg report on how transit boards are organized, and information on policies, procedures and characteristics.

New Staff Required: No new staff required.

Milestones:

- 1st Quarter:** Establish an advisory panel of transit board members to oversee the project.
- 2nd Quarter:** Conduct survey of board members to explore the features they would like to have available on the online community.
- 3rd Quarter:** Complete set-up of the site. Select a sample of board members to test the site.
- 4th Quarter:** Launch the site.

Performance Indicators:

1. Board members are able to share information with each other in a clear, concise and timely manner
2. APTA staff is able to disseminate information and communicate with board members in real-time

Incremental Cost Impact: None

Other Strategic Goal Areas Supported: Ridership, Association Development

**Fiscal Year 2009 Business Plan
Safety and Security Strategic Goal**

Title: Developing Business Member Opportunities in Safety & Security **Program Code:** 568

Executive Committee

Liaison: Vice Chair-Business Members Delon Hampton
Vice Chair-Business Member-At-Large Kim R. Green

Lead Staff: William Grizard

Project Description: Create opportunities for business members to participate in development or implementation of safety and security programs, committees, audit programs and standards related to safety and security where there is limited or no participation currently. Opportunities may include development of a business member safety and security subcommittee that would become part of the safety and security technical forum; participation in a newly created FY09 project to create an APTA Safety and Security Workshop; linkage of APTA comps database to the APTA Safety Management Program to allow audit findings to be automatically linked to business members that can provide solutions to recommendations made; joint development and testing of new services, products and technologies with APTA modal safety committees; development of methods of communication and advocacy for safety and security issues within the business membership.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Develop a steering group to identify potential actions to pursue.

2nd Quarter: Perform an analysis and prioritize action items.

3rd Quarter: Begin implementation of steering group recommendations.

4th Quarter: Evaluate results and effectiveness of project performance.

Performance Indicators:

1. Number of business members involved in APTA safety and security activities
2. Increased contact opportunities and economic benefit to business members
3. Improvement in communication of safety and security issues within APTA membership and with industry or regulatory partnerships
4. Advancement and advocacy of safety and security issue.

Incremental Cost Impact: None

Other Strategic Goal Areas Supported: Image, People and Organizations and Association Development

**Fiscal Year 2009 Business Plan
Safety and Security Strategic Goal**

Title: Commuter Rail Safety Training Program **Program Code:** 568

Executive Committee

Liaison: Vice Chair-Commuter and Intercity Rail David Solow

Lead Staff: William Grizard

Project Description: The original 16 commuter railroads,formed from the breakup of passenger service, formerly operated by freight carriers and has steadily grown to 21 operating properties. That number could double in the next 10 years based on projections. The original experienced employees are now retiring and new operators have come into operation in the last few years (ACE, Music City, Road Runner) without operational or institutional knowledge of conducting a safe commuter rail system. Appropriate safety and FRA regulatory training is needed by both current commuter rail operators and new starts. Although formal safety and security training programs exist for the bus and rapid transit modes through Transportation Safety Institute (TSI) and National Transit Institute (NTI), no such safety or security training programs are currently available for the commuter rail mode. TSI and NTI modal courses are not necessarily viable for use on commuter rail properties. The intent of this project is to form an industry partnership, seeking funding from the FRA and industry in-kind expertise to develop and implement a curriculum of safety and security courses that can capture the body of knowledge on commuter rail safety that is quickly disappearing, and use it to establish a level of competency for new employees entering the industry. The intent would be to follow the format of the TSI courses, as they have existing classes that can be absorbed into a commuter rail curriculum, and the teaching method uses subject matter expertise from the industry.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Develop an industry partnership and begin negotiations with the FRA over funding.

2nd Quarter: Develop a model core curriculum.

3rd Quarter: Develop learning objectives, lesson plans and recruit for associate teaching staff from commuter railroads.

4th Quarter: Begin implementation of schedule for training program.

Performance Indicators:

1. Achieve written agreement from FRA
2. Approval of a core curriculum
3. Completion of instructor guides and instructional materials
4. Completion of training for course instructors

Incremental Cost Impact: None

Other Strategic Goal Areas Supported: Image and Association Development

**Fiscal Year 2009 Business Plan
Association Development Strategic Goal**

Title: APTA Going Green **Program Code:** 826

Executive Committee

Liaison: First Vice Chair-Beverly A. Scott

Lead Staff: Sam Kerns; Evelyn Lozano

Project Description: As part of the industry's commitment to promoting a sustainable environment, APTA will identify areas that can be changed to promote and create a green workplace. These changes will affect not only office administration and supplies but most likely other APTA areas such as meetings, communications and member services.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Create an internal task force to identify specific changes that can be implemented immediately (low-hanging fruit). Research other associations and online communities to assist in adopting best office and meeting practices that create a more green office environment.

2nd Quarter: The task force will present a plan to senior management for review and approval.

3rd Quarter: Brief APTA staff on the approved plan and begin implementing the recommendations.

4th Quarter: Assess the success of the plan and determine any future changes that may increase APTA's green profile.

Performance Indicators:

1. Increased awareness of how every day practices greatly affect our environment; provide the staff the necessary resources to follow green practices
2. Reduction of APTA's carbon footprint

Incremental Cost Impact: None

Other Strategic Goal Areas Supported: Image

**Fiscal Year 2009 Business Plan
Association Development Strategic Goal**

Title: Web Services Improvement **Program Code:** 828

Executive Committee

Liaison: Vice Chair Research and Technology Linda Bohlinger

Lead Staff: Jeff Popovich

Project Description: The goal is to provide improved web services to members via MyAPTA, including the ability to download publications and purchase training courses; provide improved forum capabilities (listserv); ability for members to upload photos and bio information; improved distribution of papers and documents; improved ways for members to send large documents to APTA; improved ease of access (single sign-on), etc. Additionally, there will be improvement to existing functions such as meeting registration and check-in, and abstract, AdWheel, and safety survey submissions.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Review of existing services offered. Brainstorm on ways to improve existing services, as well as new ways to provide members with a better and more robust online experience.

2nd Quarter: Plan and prioritize services for development. Interview outside development consultants, if required.

3rd Quarter: Develop and test new services or changes to existing services.

4th Quarter: Roll-out new services and continue to explore additional offerings.

Performance Indicators:

1. APTA members are able to access more services online
2. Increased member satisfaction
3. Increased staff efficiency

Incremental Cost Impact: \$20,000 for professional services and software development kits.

Other Strategic Goal Areas Supported: People and Organizations

**Fiscal Year 2009 Business Plan
Association Development Strategic Goal**

Title: Review APTA Statistical Reports **Program Code:** 534

Executive Committee

Liaison: Vice Chair-Research and Technology Linda Bohlinger

Lead Staff: Robert Padgette

Project Description: APTA produces a number of significant data reports on a routine basis including the quarterly ridership report, the fare database, the vehicle database, the infrastructure database, the wage report and the management compensation report. In many cases the content of these reports has remained the same for a number of years despite significant changes in the industry. This project would both assess the value and content of existing reports, and identify potential data needs in the industry not yet met by APTA or other resources.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Review existing APTA reports and outside data reports to determine duplicative data collection efforts. Reach out to APTA staff to identify any data needs requested by members.

2nd Quarter: Review existing reports to identify key changes needed, additional data collection, or major report revisions. Review should evaluate trends in response rates, requests for reports, and the degree to which data request are met by existing resources.

3rd Quarter: Develop work plan based on results.

4th Quarter:

Performance Indicators:

1. Enhanced use of APTA statistical reports by numbers
2. Improved staff efficiency

Incremental Cost Impact: None

Other Strategic Goal Areas Supported:

**Fiscal Year 2009 Business Plan
Association Development Strategic Goal**

Title: TransitVision 2050 Follow-Up **Program Code:** 820

Executive Committee APTA Chair Michael S. Townes

Liaison:

Lead Staff: Arthur L. Guzzetti

Project Description: This effort will identify and follow-through key steps to implement the compelling, unifying vision being crafted through the TransitVision 2050 process. The effort will focus on two distinct elements. First, we will need to understand how the new vision for public transportation affects our overall strategy for funding, implementation, and partnerships. Second, we will need to develop specific actions to implement recommendations on the organization of APTA. These recommendations may result in changes to the APTA committee structure and the emphasis of staff activities.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Develop and propose an appropriate process for implementation.

2nd Quarter: Executive committee action on recommendations of the TransitVision 2050 task force and the APTA Framework for the Future task force. Identify specific actions based policy direction from the executive committee.

3rd Quarter: Begin implementation of specific actions.

4th Quarter: Continue implementation of specific actions.

Performance Indicators:

1. APTA organization that is up-to-date with the problems its membership is seeking to solve and an organizational structure that is focused on those ends.

Incremental Cost Impact: Funded from APTA reserves \$50,000.

Other Strategic Goal Areas Supported: Advocacy; Image, People and Organizations

**Fiscal Year 2009 Business Plan
Association Development Strategic Goal**

Title: Enhanced Services for Small Transit Systems **Program Code:** 513

Executive Committee

Liaison: Vice Chair-Small Operations Hugh Mose
First Vice Chair Beverly A. Scott, Ph.D.

Lead Staff: Heidi Salati, Pamela Boswell, Helene Brett, C. Samuel Kerns

Project Description: Over the years, APTA has executed several membership initiatives and developed and implemented recommendations to address small operator concerns regarding the scope of member services. While there is consensus that APTA's programs and services are beneficial to existing small transit system members, there is also an interest in retaining existing small transit system members and attracting non-APTA member agencies serving small urban areas. The small operations and member services committees would collaborate to review previous research and recommendations implemented as part of earlier membership initiatives. This project will review opportunities, programs and services geared specifically to the needs of smaller systems as part of a strategy to assure that APTA has small operators in each congressional district and state.

New Staff Required: No new staff required.

Milestones:

1st Quarter: Establish an advisory panel representing the small operations and member services committees to oversee the project. Revisit previous research, findings and implementation plans of earlier initiatives.

2nd Quarter: Develop scope of project in consultation with the advisory panel.

3rd Quarter: Conduct survey of APTA members and non-members. Conduct listening sessions at APTA conferences and state association meetings.

4th Quarter: Survey and listening session results compiled and analyzed. Action plan is developed

Performance Indicators:

1. Level of response to survey from APTA members and non-members
2. Improved understanding of small transit system member and non-member needs
3. Increased number of non-APTA members expressing interest in APTA membership

Incremental Cost Impact: None.

Other Strategic Goal Areas Supported: People and Organizations