

**AMERICAN
PUBLIC
TRANSPORTATION
ASSOCIATION**

FY19 Business Plan

May 2018

Introduction

The FY 2019 business plan is the fourth plan established under APTA's 2015-2019 Strategic Plan. It presents the new activities and enhanced services APTA will implement in FY 2019 to ensure its five strategic goals as well as association development needs. It outlines FY18 accomplishments and the priorities for resource allocation in FY19 as well as key metrics to measure progress. A comprehensive overview of all APTA services, including APTA committees, can be found in the members section of the APTA website.

APTA's FY 2019 business plan is established in the spirit of APTA's vision and mission and supports the goals set out in APTA's 2015-2019 Strategic 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.

STRATEGIC GOALS

SAFETY AND SECURITY FIRST

Promote, develop and support continual improvement of safe and secure public transportation systems.

RESOURCE ADVOCACY

Support the growth of federal and other funding and financing resources, project delivery approaches and a more efficient regulatory environment.

WORKFORCE DEVELOPMENT

Help members attract, develop and retain a diverse workforce.

EVOLVING MOBILITY LANDSCAPE (formerly "Demographic Shifts")

Assist members in addressing ever-evolving lifestyle and mobility needs.

TECHNOLOGICAL INNOVATION

Lead and serve member efforts to evaluate, develop and adapt to emerging technologies.

ASSOCIATION DEVELOPMENT

Provide world-class member services through a vital and robust organization.



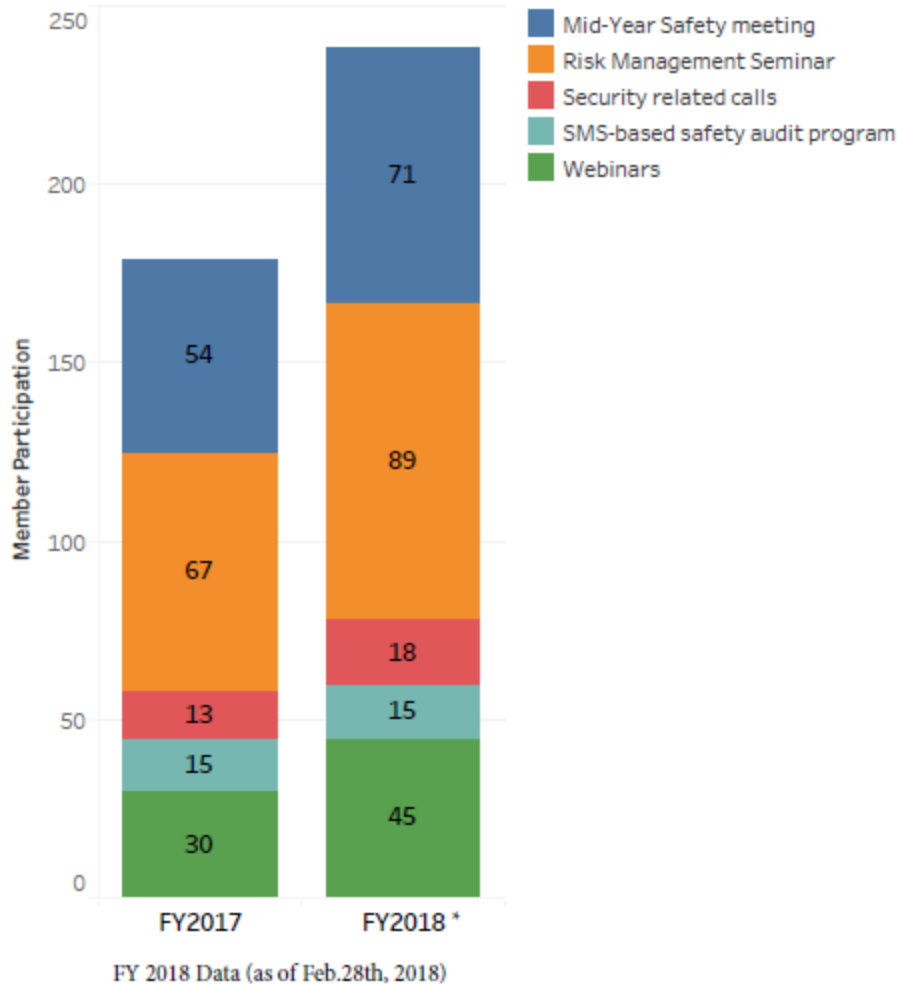
Outcome

Demonstrably reduce the gap between the stated importance of Safety and Security, and the actual importance, as evidenced by increased proactive measures to implement Safety & Security First Culture Components, and improve overall industry performance related to Safety & Security.

FY18 Accomplishments

1. a) Increased member participation in Safety Programs
 - b) Increased Monthly Safety committee webinars/calls (i.e. Safety Spotlight Webinars)
 - c) CEO/TBM/BMBG engagement in safety specific topics including safety awards, conference sessions and use of APTA programs
2. a) Increased member participation in Security and Risk Management Programs
 - b) Increased Monthly security-related calls
 - c) CEO/TBM/BMBG engagement in security specific topics including security awards, conference sessions and use of APTA programs
3. Creation and implementation of a revised Safety Coordinating Council to oversee safety audits, database and programs
4. Development of a National Transit Safety Database including agreed upon industry safety definitions
5. Participation of agencies in a new SMS-based safety audit program
6. Creation of a 2018 Transit Industry Safety Report highlighting known data and safety messaging

Member Engagement Strategic Goal #1: Safety and Security First



FY 19 Priorities and Metrics

- 1. Plan and execute a first joint Safety and Security Seminar**
 - a. First joint summit is executed successfully
- 2. Deliver updated and new security standards and recommended practices**
 - a. Update a minimum of five and create a minimum of three new security standards and best practices
- 3. Support industry in implementation and maintenance of Positive Train Control (PTC) systems, including continued proactive communications and education**

- a. Sustained focus on Positive Train Control users groups for I-ETMS and EATC as deadline approaches bringing together operators, suppliers and regulators
- b. Strategy created for APTA PTC maintenance and implemented
- c. Number of PTC-focused meetings with Commuter Rail systems
- d. Number of media interviews and responses on PTC

4. Continue proactive communications and education on cyber security

- a. Sustained level of communications and education on cybersecurity over FY18

5. Communicate to members the urgency and implications of the State Safety Oversight Certification deadline

- a. Sustained level of communications and education on SSO certification over FY18

6. Place a continued focus on personal security and safety in public transportation (including sexual harassment of passengers and the transit workforce and the issue of homelessness), both from an information-sharing and best practices perspective

- a. Toolkit(s) prepared in FY18 are updated and expanded upon and topic continues to be focus of conference sessions, webinars and articles

7. Enhance safety efforts on transit trespassing and vehicle strikes

- a. Sustained level of communications and education on transit trespassing and vehicle strikes over FY17

8. Continue to pursue international exchange opportunities on safety and security issues

- a. Sustained level of involvement in international activities over FY17





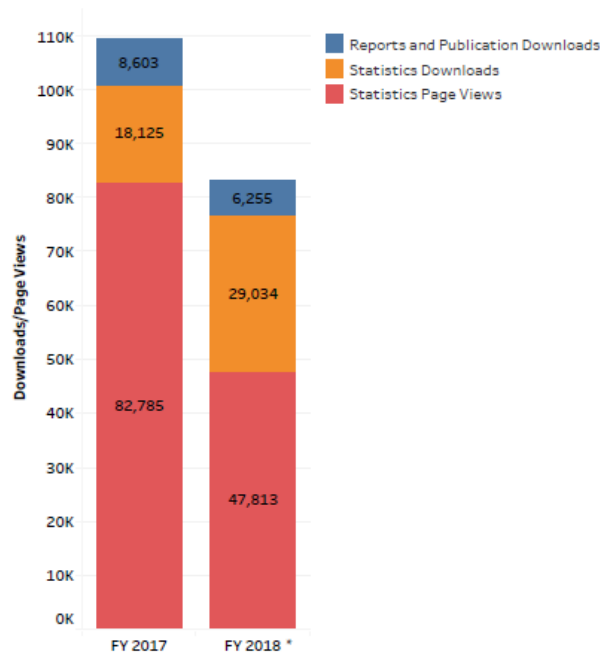
Outcome

Maintain and build APTA's position with federal decision makers and influencers as the go-to resource and advocate for its members in order to influence the implementation of the FAST ACT and lay the groundwork for future favorable legislation

FY18 Accomplishments

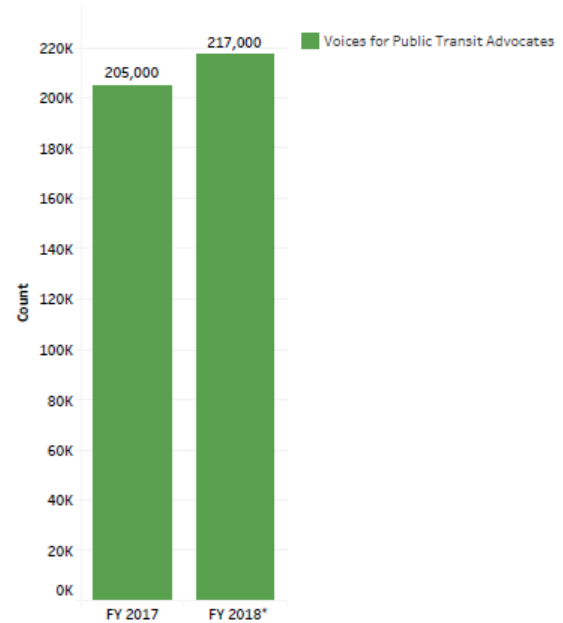
1. Increased number of Voices for Public Transit advocates in targeted districts
2. Production of timely and informative policy reports to advance APTA's advocacy goals
3. Increased the number of hits/uses/registrations for existing and new reports, webinars and tools
4. Increased CFTE outreach, together with feedback on the usefulness of APTA tools, resources, networking and other assistance utilized during such campaigns
5. Number of outreach events and level of media coverage and/or attendance
6. Level of interaction with key advocacy partners (including but not limited to US Conference of Mayors; National League of Cities; National Association of Counties; National Governors Association; American Association of State Highway and Transportation Officials; US Chamber of Commerce)
7. Development of RFP for legislative consulting services

Member Engagement
Strategic Goal #2:
Resource Advocacy



FY 2018 Data (as of Feb. 28th, 2018).

Voices for Public Transit
Advocates
Strategic Goal #2:
Resource Advocacy



FY 2018 Data (as of Feb. 28th, 2018).

FY19 Priorities and Metrics

1. **Consensus-building our priorities for the next surface transportation bill**
 - a. Successful consensus-building process with APTA-wide agreed upon priorities
2. **Continue advocacy on infrastructure initiatives and appropriations**
 - a. Increased level of mobilization by APTA members, VPT advocates and coalition partners
3. **Mobilize Voices of Public Transit advocates and align the Center of Transportation Excellence more closely with APTA efforts in support of local referenda and local funding initiatives, including a special event in 2020**
 - a. Increased mobilization of VPT advocates on local referenda

4. Implement pro-active outreach on public transportation to New Members of Congress and new Committee leadership following the mid-term election.

- a. Development of new materials for Congress members, and outreach to Committee leaders by APTA members and staff.

5. After mid-term elections, undertake national research and refresh of APTA external messaging on public transportation

- a. Successful completion of research and development of messaging platform in Quarter 4.

6. Host the 2018 State Public Transportation Partnerships Conference with a more robust advocacy component

- a. Increased attendance for the 2018 State Public Transportation Partnerships Conference over FY18.

7. Carry out a policy and advocacy-focused study mission to Canada on innovative infrastructure development and implementation drawing on Canada's current robust infrastructure investment experience

- a. A successful study mission executed in Q1 measured by member participation, satisfaction, quality of output and financial viability





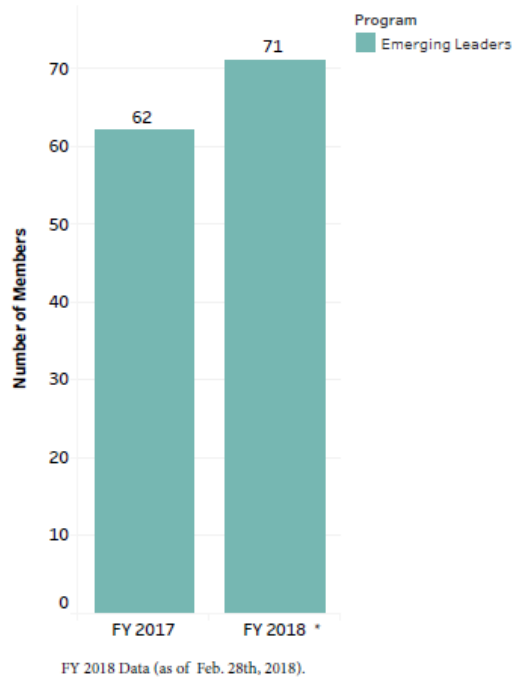
Outcome

Influence increases in industry-wide workforce diversity, professional development/training opportunities, a more robust workforce pipeline, and become the industry-recognized, “go-to” resource.

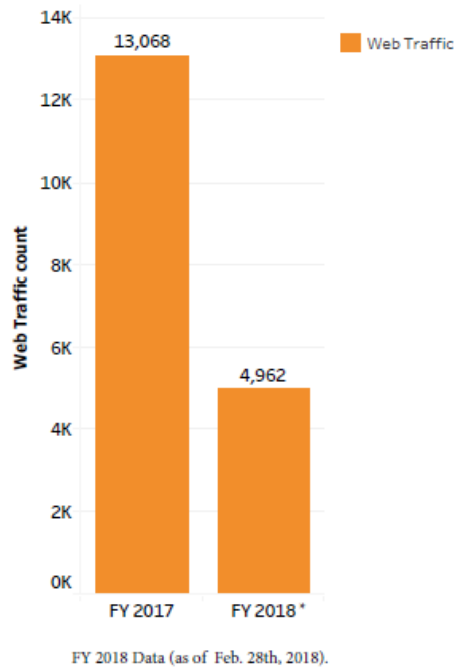
FY18 Accomplishments

1. Expanded Emerging Leaders Program curriculum is created
2. Phase I of the “hub” is launched on APTA’s website
3. Plan developed with NTI on new training opportunities and programs for the industry.
4. Convening an industry-wide summit addressing APTA’s role in preparing public transit’s workforce of the future, i.e. skilled, sustainable and professionalized
5. Comparable ratings regarding member satisfaction of workforce development services and programs
6. Increased number of members participating in APTA’s current and new leadership and professional development programs
7. Increased website traffic on the workforce development “hub”

Member Engagement
Strategic Goal #3:
Workforce Development



Member Engagement
Strategic Goal #3:
Workforce Development



FY 19 Priorities and Metrics

1. Continue to advance the online education and online learning opportunities

- a. Level of member engagement in and satisfaction of eLearning modules piloted in FY18 gauged through surveys, phone interviews and queries (Q1)
- b. FY18 phase 1 pilot eLearning modules is expanded and development is completed, with testing and roll-out of a new course (Q1-4)

2. Continue to advance the framework for an APTA credentialing and certification programs

- a. Proposed framework for Industry certification and credentialing models is rolled out and realistic pathways to pursue are determined (Q1)
- b. Standards for certifying and credentialing trainings and eLearning modules are created (Q2 - Q4)
- c. Recommendations for proposed, initial certification and credentialing options are presented (Q4)

3. Continue to develop the “virtual” APTA Workforce Development Center

- a. A Learning Management System and Workforce Metrics software is integrated (Q1)
- b. Level of industry content mined and best practices and programs are highlighted (Q1-Q4)
- c. An online forum is created of continual industry dialogue in which ideas and workforce content can be shared (Q1-Q4)





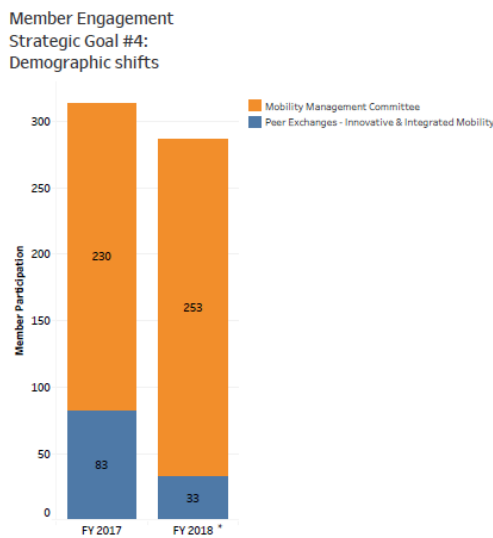
EVOLVING MOBILITY LANDSCAPE (DEMOGRAPHIC SHIFTS)

Outcome

Be a go-to resource and incubator for innovative ideas to support members as lifestyle and mobility trends change, and equip the public transportation industry with the heightened awareness to position themselves in an evolving mobility ecosystem.

FY18 Accomplishments

1. APTA maintains and expands thought-leadership on emerging and salient demographic issues associated with the changing mobility and economic landscape (number of hits on new APTA reports, tools, session ratings, media requests, external coalitions, and peer-exchanges)
2. APTA maintains a cutting-edge, member-driven set of policy principles on integrated mobility and transformative technology
3. Increased number of new mobility startups brought in as new APTA members
4. Increased membership of the APTA Mobility Management Committee
5. Increased level of engagement with FTA on the changing rules and landscape



FY 2018 Data (as of Feb. 28th, 2018).

FY 19 Priorities and Metrics

- 1. Hold an APTA Policy Forum on the Future of Mobility in July 2018 and the Industry Leadership Summit in November 2018.**
 - a. Successful execution of the APTA Policy Forum and Industry Leadership Summit, resulting in one or more White Papers to share with stakeholders and members
- 2. Increase overall APTA content on current and emerging mobility trends, including reports and research, webinars, sessions at all APTA meetings and serving as a virtual Resource Center, the Innovative Mobility Hub, for identified best practices in the New Mobility Paradigm**
 - a. The degree to which APTA maintains and expands thought-leadership on emerging and salient issues associated with the changing mobility and economic landscape (number of hits on new APTA reports, tools, session ratings, media requests, external coalitions, and peer-exchanges)
 - b. The degree to which APTA maintains a cutting-edge, member-driven set of policy principles on integrated mobility and transformative technology
 - c. Increased membership of the APTA Mobility Management Committee
 - d. Completion of three new reports and two additional webinars on emerging mobility topic
 - e. Finalized case studies for the Advancing Mobility Management Course as part of the National Center on Mobility Management (NCMM)
- 3. In conjunction with the National Center for Mobility Management (NCMM), host peer exchanges, webinars, and forums on integrated mobility**
 - a. Completion of two peer exchanges on innovative integrated mobility management
 - b. Increased number of webinar and blog posts on the NCMM website
- 4. Develop and undertake a comprehensive communications plan on public transit and shared mobility to position the industry as a thought leader and driver of change**
 - a. Development of communications plan in Q1 and implementation in the remaining three quarters
 - b. Increased awareness of new services and pilot projects by public transit organizations

5. Organize and execute a European study mission on shared mobility/Mobility as a Service (MaaS)

- a. Planning launched by end of Q1 for a successful study mission in Q4 measured by member participation, satisfaction and financial viability

6. Bring international speakers/research/models on shared mobility to APTA events

- a. High-level of satisfaction with international speakers/content is obtained and an international element is consistently present





Outcome

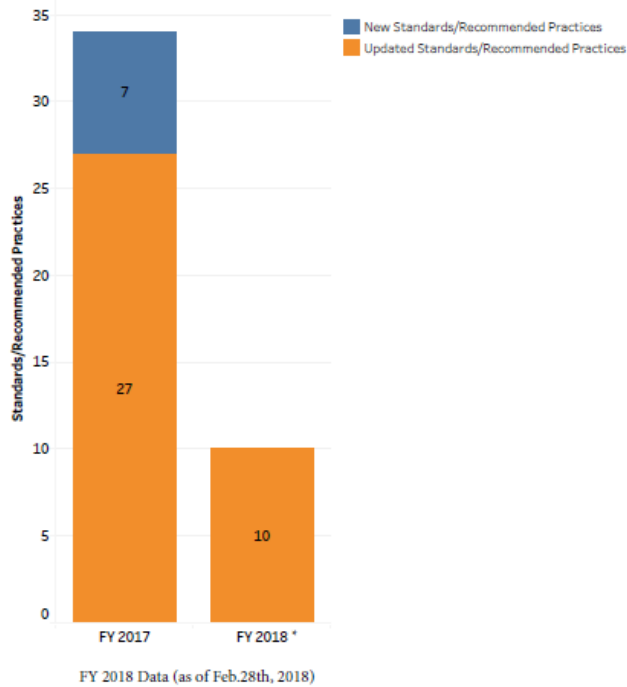
Recognized as the go to technology resource for the industry, where members come to find out about emerging technology, identify resources and navigate possible solutions for adapting to emerging technologies.

FY18 Accomplishments

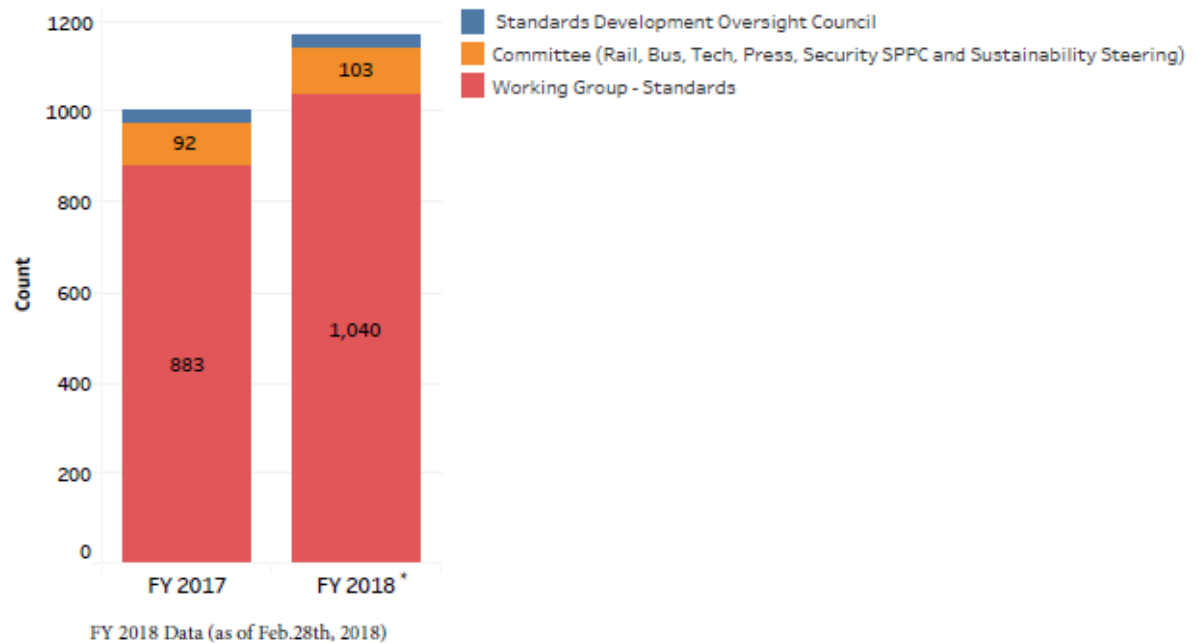
1. Development of bus sustainability and alternative energy programs
2. Consistent development and publication of Technology briefs
3. Consistent development of quarterly PTC implementation report
4. Documented partnership agreements with AREMA and ASME to streamline industry standards and guidelines to avoid duplication and enhance member use
5. The degree to which standards are being developed, refreshed and maintained based on SDOC annual plan
6. Ensured sustainability of Rail Transit Infrastructure Maintenance Summit theme and expansion as applicable to international best practices at Annual Rail Conference

FY19 Business Plan

Standards/Recommended Practices Strategic Goal #5: Technological Innovation



Member Engagement Strategic Goal #5: Technological Innovation



FY 19 Priorities and Metrics

1. Continue partnership with federal and other stakeholders to advance the technical standards program reflecting the needs of the industry

- a. Consistent participation with FTA sponsored standards coordination body
- b. FTA priorities incorporated into the APTA Standards program. FTA has proposed 1 priority standard to be developed this calendar year.
- c. NPRM2 closed out within Engineering Task force of RSAC

2. Develop and host webinars on current and emerging trends in engineering, technology and innovation

- b. Provide quarterly technology related webinars and tech briefs

3. Provide workshops, summits and direct engagement for technical management to exchange best practices (i.e., Rail Infrastructure Maintenance Summit)

- a. Hold a successful 3rd rail infrastructure summit with sustained member participation
- b. Launch 1st vehicle maintenance summit
- c. Accomplish bi-monthly rail infrastructure summit calls

4. Encourage flexible technology procurements (RSAC/ETF, etc.) with members and federal partners

- a. Sustained focus in procurement committees and number of presentations at key technical conferences promote flexible procurement practices

5. Continue to review and publish standards that are over five-years old

- a. Update of approximately 60 critical standards/recommended practices
- b. Creation of 10 new standards/recommended practices





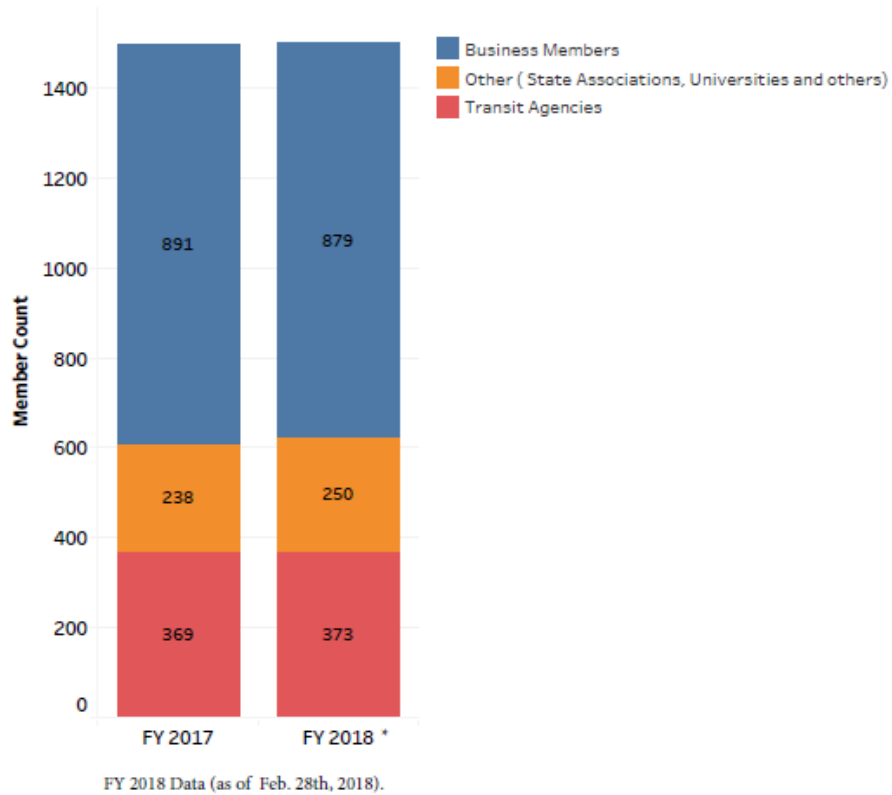
Outcome

A solid assessment of membership (structure, fee, composition), member services and engagement and sound implementation of recommended solutions to improve.

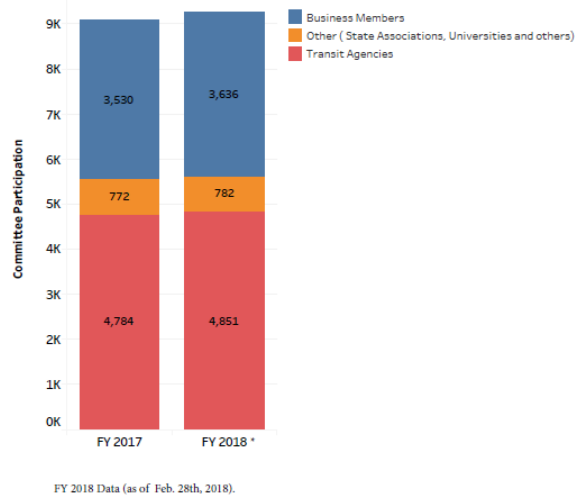
FY18 Accomplishments

1. Increased overall membership satisfaction
2. Annual measurement of actual financial status compared to annual budget within 10% of net results
3. Implementation of revenue task force recommendations including improvements to annual value statement and new program offerings
4. Development of an APTA-wide membership recruitment plan
5. Management compensation database produced
6. Successful onboarding of a new CEO
7. Bylaws changes and accompanying policies successfully implemented
8. Committee structure reviewed and any recommended adjustments made
9. A revised Diversity Plan and Council created and implemented
10. Successful implementation of a new Digital APTA presence

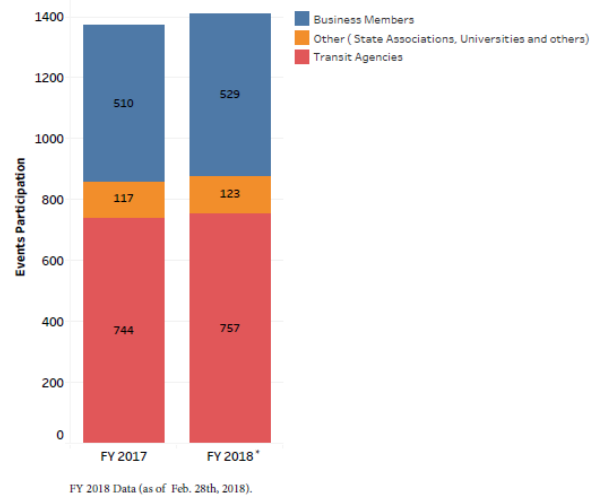
Membership Numbers
Strategic Goal #6:
Association Development



Member Engagement
Strategic Goal #6: Association
Development



Member Engagement
Strategic Goal #6: Association
Development



FY 19 Priorities and Metrics

1. Implement Year 2 of the approved revenue task force implementation plan

- a. Completion of audit in Q2 and implementation in Q3 and Q4
- b. Undertake analysis on incorporating a jobs board on www.apta.com
Analysis completed by Q2 and recommendations in Q3
- c. Consider consolidating sponsorship sales
Evaluate sponsorship activity that can be outsourced and prepare RFP for consultant search

2. Monitor and strengthen the two components of Digital APTA, an ongoing project.

- a. Increased number of APTA members engaged in online communities and expand number of communities as resources permit
- b. Ongoing oversight and improvement of the APTA website

3. Identify and account for any changes that impact the financial outlook due to the FASB revenue recognition rules that take effect 2019

- a. Identify potential impact by Q1

4. Based on the new meetings portfolio, refocus meetings programming, assess the financial impact on revenue and expenses and undertake rebranding of APTA meetings and increase marketing

- a. Positive member feedback received on launch and execution of rebranded meetings portfolio

5. Develop an annual webinar program focusing on top and emerging issues facing members, ensuring coordinates effort with initiative to plan and implement “pop up” events on trends and emerging issues

- a. Successful, recognizable webinar series is launched measured by number of webinars, level of member participation and sponsorship levels

6. Launch APTA’s voluntary benchmarking initiative

- a. Completion of research project on benchmarking program In Q 1 and launch of project with members in Q 1

7. Produce a new APTA report evaluating opportunities for quantifying transit agency data

- a. Completion of research project on monetizing transit agency data by Q2

8. Reestablish APTA's wage and contract database

- a. APTA's wage and contract database reestablished by Q4

9. Move many APTA public transportation statistics to full public view

- a. Statistics moved to public view by Q4

10. Launch process for the update/renewal of APTA's Strategic Plan

- a. New strategic planning process approved by end of Q2, and launched by Q3

11. Conduct a year-long membership recruitment effort with an initial focus on increasing memberships among small and mid-sized public transportation agencies

- a. Increase membership of small and mid-sized agencies by 30.
- b. Increase new dues revenue by \$150,000.

