



**THE FIRST STEPS TO *TRANSITVISION* 2050**

**AMERICAN PUBLIC TRANSPORTATION ASSOCIATION  
2010-2014 STRATEGIC PLAN**

**REVISED DRAFT**  
**January 2010**

## INTRODUCTION

### Strategic Opportunity

*“Transit has to reinvent itself with a shift to a more aggressive, salient and creative business and service model where mobility is at its center.”*

APTA Member

This Strategic Plan comes at an extraordinary time for public transportation—a time of unprecedented opportunities for growth as well as major challenges to development. The current economic crisis, the increasing focus on energy independence and environmental sustainability, demographic changes affecting the workforce and ridership, and technology advances all will greatly affect the future of public transportation.

We are at a critical juncture. The decisions we make today and in the next five years will dramatically change the landscape of public transportation.

Ensuring a bright future will require great political will, strong public and policy support, and sound financial structures. It will also require the industry to continuously innovate to provide the best services possible and help make communities more livable.

APTA’s Strategic Plan aims to serve and engage the full breadth of APTA’s membership—public and private, large and small. It looks at mobility in the broadest sense—at urban, rural, metropolitan, state and inter-city levels.

### The Strategic Planning Process

The starting point for the 2010-2014 Strategic Plan was an open conversation with the APTA membership from January through October of 2009. The goal was to understand the needs of APTA members over the next 5 years and how APTA can help them meet those needs.

Since January 2009, the association has convened brainstorming sessions at five major APTA conferences and the APTA Annual Meeting, held meetings and teleconferences with APTA committees, and in June 2009, conducted an online survey of the APTA membership.

Open brainstorming sessions with members were held at the following APTA events:

- APTA Transit CEOs Seminar
- APTA Legislative Conference
- APTA Bus and Paratransit Conference
- APTA Rail Conference
- APTA Transit Board Members Seminar
- APTA Annual Meeting

In addition, the following committees provided time on their meeting agendas for a brainstorming session:

- Business Member Board of Governors
- Human Resources
- Small Operations
- Marketing and Communications
- Research and Technology
- Access
- State Affairs
- Policy and Planning

Meetings were also convened with Leadership APTA's 2009 class. In addition, the strategic plans of the Business Members Board of Governors and the Research and Technology Committee were used as input to the APTA Strategic Plan, as were the recommendations of the APTA Blue Ribbon Panel on Workforce Development and the APTA Framework for the Future and Governance and Committee Structure Task Forces.

APTA asked members the following questions:

1. In the next five years, what trends (political, economic, societal, environmental, technological, legal, and industry) are most likely to affect the way your organization functions/does business? And why?
2. Aware of the emerging trends, what would you do right now that you are not already doing or hope to continue doing to set your organization up for success in the next five years?
3. What would success look like for your organization in five years in terms of goals, performance indicators, and outcomes?
4. What would you wish APTA to do to help you achieve those goals?
5. How would you work collaboratively with your colleagues in the industry to help you achieve those goals?

To obtain a 360-degree view of itself, APTA reached out to a number of organizations with which it has regular communication and collaboration. The following organizations participated in individual interviews on their vision of APTA and its future: Federal Transit Administration, Federal Railroad Administration, Community Transportation Association of America, Eno Transportation Foundation, ITS America, Council of Minority Transportation Officials, Women's Transportation Seminar, American Road and Transportation Builders Association, and the Amalgamated Transit Union, as well as *Mass Transit* and *Railway Age* magazines.

## Overview

The strategic planning process identified the key needs of APTA members and five strategic goals on which APTA will focus in the next five years to fill those needs:

### Economic Sustainability

### Environmental Sustainability

### Safe and Reliable Mobility Systems

### A Quality Workforce

### Public Transportation: Essential Value to All

For each strategic goal, the plan includes a number of objectives to guide the implementation of the goals. For each objective, the key actions and strategies illustrate how the objectives will be implemented.

## Implementation

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The Strategic Plan guides APTA in developing its annual business plans and budgets. It ensures that the association's resources are used to serve members where they need it the most.

*“In 2050 America’s energy efficient, multi-modal, environmentally sustainable transportation system powers the greatest nation on earth.”*

*TransitVision 2050*

The Strategic Plan is a bold step toward a stronger, sustainable future for APTA members and will help the industry achieve the ambitions of *TransitVision 2050*, APTA’s vision for the future of the entire transit industry.

The Strategic Plan incorporates measures of success and identifies the capacity of the association to implement the strategies. A periodic review of the plan will take place to evaluate how implementation is progressing and to make adjustments.

## Association Development

To be in the best position possible to serve its members and achieve the 2010-2014 strategic goals, APTA will continue to focus on strengthening itself as an association, ensuring:

- Fiscal responsibility and an expanding and diversified revenue stream to build capacity for meeting the strategic goals;
- Constant growth in overall membership and a diversity of membership representing the industry;
- Consistent high quality and relevance of its member services and maximum participation of its diverse membership, and;
- A well-developed, agile and responsive staff with the necessary skills and expertise to meet the association's needs.

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## STRATEGIC GOALS

### ECONOMIC SUSTAINABILITY

#### Member Issues

APTA members have expressed a need for more guaranteed capital and operational funding and economy-independent and inflation-resistant sources of funding, more efficient federal grant administration, greater overall cost efficiency and more public understanding of public transportation funding.

**APTA GOAL** → Support members in the development of an economically sustainable financial structure for the industry that accommodates existing and future demands for growth.

*“The certainty of future funding has enabled management to focus on serving their customers, rather than on a never-ending cycle of budget balancing.”*

*TransitVision 2050*

#### APTA Objectives and Action Plan

##### 1. Help members obtain increased capital and operating funding from more stable and diverse sources.

###### A. Policy Priorities

- 1) Conduct an effective advocacy campaign to pass a long-term authorization bill that contains a stable, guaranteed source of revenue and secure federal funding from other sources.
- 2) Identify and advocate for new and diversified revenue sources and recession-proof and inflation-resistant revenue streams.
- 3) Conduct research and advocate support for alternative funding models.
- 4) Advocate for legal frameworks that allow members to maximize their assets/funding sources and collect the ancillary income from various sources.

*“APTA needs to be nimble and help its members and itself respond more effectively and rapidly to the shifting policy landscape.”*

**APTA Member**

###### B. Advocacy Support

- 1) Increase political effectiveness, visibility, and area of influence on Capitol Hill and with the current Administration.
- 2) Conduct research and issue policy papers that support advocacy for a larger appropriation for public transportation.
- 3) Facilitate enhanced grassroots advocacy at all levels.

**C. Member Readiness**

- 1) Promote existing resources that members can use to advocate for funding through state, local, and private resources.
- 2) Provide members with tools to maximize self-generated funds, especially through passenger fares.
- 3) Educate members on alternative funding possibilities and offer training on how to apply for funding.
- 4) Continue to educate and guide members through the funding processes at the Federal Transit Administration and other agencies (e.g., CMAQ, DOE, HUD) particularly as new requirements are attached to any new funding sources.
- 5) Provide tools and expand opportunities for smaller businesses and disadvantaged business enterprises to maximize participation in all aspects of contracting, certification reciprocity, and bonding.

**D. State and Local Efforts**

- 1) Educate members on successful state and local funding initiatives.
- 2) Continue to offer tools to members, in partnership with state departments of transportation and state transit associations, which help members work with state legislatures and other regional entities that fund transportation.
- 3) Participate in regional meetings that focus on public transit operations and state and regional transit planning, programming, and funding needs.

**2. Support members in identifying, develop, and implement new business models and processes to make the industry more sustainable, customer-focused, and competitive.****A. New Business Models**

- 1) Research, identify, and promote new business models applicable to and feasible for public transportation.
- 2) Research, identify, and communicate international financing models that could apply to public transportation (e.g., public private partnership models, land development rights).
- 3) Continue to create and disseminate studies that identify specific best practices and procedures for economic sustainability.

**B. Streamlining processes**

- 1) Identify strategies that streamline processes, reducing costs for manufacturers, suppliers, consultants, and contractors that result in lower costs for services to transit systems.

- 2) Continue pursuing possibilities for economies of scale through the standardization and adoption of standards of vehicle specifications and the wide-scale purchase of technology.
- 3) Identify existing and new approaches, including training, that achieve better management of projects, the reduction of change orders and claims, and improved performance that benefit both the private providers of goods and services and transit systems.
- 4) Expand the knowledge of standard procurement and risk allocation procedures that reduce the cost of proposal and bid development and submission for goods and services rendered by transit systems.

“*[There is] a real role for the private sector to help drive a more efficient and effective changing market [together] with the public sector through different business models, investing in greater research and development, and adapting new technologies for interconnectivity.*”

APTA Member

### 3. Help broaden markets for public transportation products and services.

#### A. Advocacy

- 1) Continue to make the case for private sector investment in the public transportation market, monitoring market trends and investment opportunities.

#### B. Member Capacity

- 1) Continue to provide briefings to business members on resources available through the U.S. government that facilitate international business.
- 2) Continue internship projects with a long-term goal of developing international business.
- 3) Continue to provide briefings to business members on how to track tenders posted by international development banks and work closely with APTA’s sister organizations around the world and embassy transportation attachés to inform members of projects abroad.

#### C. Business Development

- 1) Continue to provide venues for APTA business members to showcase new products, services and approaches to projects.
- 2) Continue to maximize opportunities for making business-customer and business-to-business connections through the APTA EXPO, showcases and other platforms.
- 3) Create international opportunities for business through continued collaboration with the Federal Transit Administration’s international office, more trade missions (virtual and real) to relevant countries for APTA business members, and the participation of APTA members in international delegation visits to the U.S.

- 4) Increase international attendance at the APTA EXPO through increased promotion to domestic and international public transportation buyers.
- 5) Raise awareness of opportunities to exhibit abroad and connect business members with local U.S. commercial service staff in those areas.
- 6) Recruit international speakers for APTA events to speak about business opportunities in specific regions and countries.

#### 4. Increase public understanding of how public transportation is funded and the importance of funding.

##### A. Messages

- 1) Continue to educate the public, Congress, the Administration and other policymakers on why more funding is needed by raising awareness of public transportation issues and the value of public transportation investments.
- 2) Continue to reach out to the media regarding the importance and structure of public transportation funding.
- 3) Articulate a common agenda for more financial support for public transportation with key transportation coalition partners.
- 4) Continue to demonstrate the positive state and local impact of public transportation projects on jobs and economic development in communities.

“Often the public fails to realize the value of transit investments or external costs of vehicle travel.”

APTA Member

##### B. Activities

- 1) Establish programs that increase transit visibility to traditional and non-traditional audiences and provide tools for members to do so at local and regional levels.
- 2) Continue special events and advertising targeted to policymakers on Capitol Hill and others who influence public policy and opinion.

## Measures of Success

- Authorization legislation has passed that adopts APTA’s recommendations to double the current transit investment.
- Grant funding has been secured from new funding sources to support strategic actions for each strategic goal.
- New business models for public transportation have demonstrated it is possible to achieve better cost and revenue balances.
- There is an increase in contracts and in the dollar value of contracts resulting from contacts made at EXPO and showcases.
- The market for public transportation-related products and services has increased by 20 percent.
- Significant advances have been made in standardizing bus and rail car specification tracked by monitoring designs and amenities.
- There is a steady increase in ridership by an average of at least 3 percent a year.

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## ENVIRONMENTAL SUSTAINABILITY

### Member Issues

APTA members need assistance with best practices for greening the industry and building the industry's green credibility.

**APTA GOAL** → Establish services for APTA members that help environmental sustainability become integral to how the public transportation industry functions and what it provides to meet the needs of public transportation customers.

*“Transit organizations themselves are ‘green leaders’ and are respected within their communities.”*

*TransitVision 2050*

### APTA Objectives and Action Plan

#### 1. Support members' efforts to green their own operations and to promote more walkable and sustainable development.

##### A. Knowledge Base

- 1) Establish a definition of environmental sustainability in the public transportation industry for use by the APTA membership.
- 2) Develop and maintain information on energy efficiency and conservation practices being used throughout the industry, by continuously updating success stories/lessons learned.
- 3) Expand industry awareness of how to integrate transportation and land-use planning; promote transit-supportive land use and its environmental and social benefits.
- 4) Define and promote what types of green jobs exist for the transit industry.
- 5) Raise public and private sector members' awareness of how sustainability goals support each other.

##### B. Operations

- 1) Educate the APTA membership on the benefits of investing in greening their organizations.
- 2) Develop tools for lifecycle cost evaluation and help members make the business case for sustainability.
- 3) Secure dedicated funding for alternative-fuel vehicles and green facilities through climate change and authorization legislation that encourages private sector investment in new and emerging green technologies.
- 4) Promote studies that address ways to become greener through specific practices and vehicle technologies.

- 5) Identify the benefits and responsibilities of a chief sustainability officer or similar position in organizations. Continue to implement procedures at APTA conferences to reflect green practices—e.g. online programs, recyclable badges, and the elimination of plastic conference bags.

### C. Outreach

- 1) Evaluate and continuously redesign the Sustainability Workshop to help members become as green as possible.
- 2) Continue to conduct a transit-oriented energy efficiency and conservation product and services segment at the APTA EXPO.
- 3) Bring the issue of sustainability into smaller APTA workshops (e.g., marketing, legal affairs, university transport).
- 4) Continue to publish stories on environmental sustainability issues.
- 5) Expand media outreach on transit’s environmental friendliness and sustainability qualities.

### D. Incentives and recognition

- 1) Increase the number of signatories to APTA’s Sustainability Commitment.
- 2) Use the Sustainability Commitment to document the progress public transportation agencies and businesses are making on sustainability.

## 2. Develop a high level of public and policymaker awareness of public transportation as a key solution to climate change, energy efficiency and independence, and environmental improvement.

### A. Messages

- 1) Continue to illustrate how public transportation is a catalyst for sustainable development and livable communities and the positive link between transit and land use in building livable communities.

*“There needs to be a stronger linkage between public transit and national energy security and climate change policies.”*

**APTA Member**

- 2) Increase public awareness of the environmental benefits of public transportation.
- 3) Position public transportation to receive substantial proceeds from carbon pricing revenues, continuing to develop

methodologies for quantifying avoided emissions and working with the The Climate Registry, governments, and other organizations to get avoided emissions included as accepted protocol in emissions reporting for transit agencies.

- 4) Work in concert with other organizations to develop a consistent message on sustainability and transportation.

**B. Activities**

- 1) Increase coverage on blogs, social networking media, and national media outlets promoting public transportation's environmental benefits.
- 2) Continue to exhibit at conferences focused on environmental issues.
- 3) Increase participation in National Dump the Pump Day and Earth Day activities.

**3. Develop new relationships with non-DOT agencies and new partnerships with non-traditional industry groups, to gain expertise and support for public transportation as an essential element of sustainability.****A. Stakeholder Awareness**

- 1) Develop stronger relationships with the U.S. Department of Energy, university research centers, state and local energy advocacy groups, and other relevant entities to enhance expertise on greening the industry and positioning the industry as green.
- 2) Work with both the public sector (e.g., EPA) and private sector (e.g., the energy sector) to guide research and to access funding for energy efficiency improvements in transit operations.

**B. Member Awareness**

- 1) Raise awareness among APTA members of successful greening practices from outside the industry, bringing in more speakers on sustainability and holding new technology and problem-solving talks at APTA events.
- 2) Develop partnerships with appropriate environmental organizations to help APTA members become greener.
- 3) Support efforts by public transportation agencies to build partnerships with municipalities, Metropolitan Planning Organizations, and regional and state agencies that are pursuing sustainable development initiatives.

## Measures of Success

- One-third of APTA members have signed APTA’s Sustainability Commitment, one-half of them are committed to the silver level or higher.
- New funding, programmatic, or technical resources have been obtained from non-DOT sources.
- There is a significant rise in the number of LEED-certified facilities built or operated by APTA members.
- There is a significant increase in the number of positive links made between public transportation and environmental issues by legislators and in the media.
- LEED-Neighborhood Development includes significant joint development projects.
- A majority of APTA members have created a sustainability position at the executive level, such as a chief sustainability officer.
- Widespread operational efficiencies from implementing environmental improvements are tracked among the APTA membership.

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## SAFE AND RELIABLE MOBILITY SYSTEMS

### Member Issues

APTA members communicate a need to improve the efficiency of operations and management. They want APTA to help them apply new technology and practices to improve the public transportation experience; achieve more interconnectivity, intermodality, and interoperability of intercity systems; become true mobility service providers; and strengthen the linkage of transit to land-use.

**APTA GOAL** → Support members in developing efficient, safe, and attractive systems and services that meet the current and future needs of riders and engender a high level of customer confidence.

*“Good public transportation has made the overall transportation system work better.”*

*TransitVision 2050*

### APTA Objectives and Action Plan

1. Assist APTA members in improving the safety and performance of their systems.

#### A. Safety

- 1) Support APTA members in creating a safety-first culture by providing guidance on emphasizing employee safety and by helping members improve safety in all aspects of transportation.
- 2) Support members’ efforts to prepare and implement positive train control.
- 3) Act as the primary source for the national media regarding transit safety, security, and quality of service.
- 4) Educate the public on transit safety and tell the story of how safe, secure, and reliable transit is.
- 5) Partner with other transportation organizations promoting public transportation as a strong solution to meeting mobility goals because of its safety record.
- 6) Develop and provide an online self-assessment tool for system safety.
- 7) Continue to publish stories that highlight examples of safe practices and public transportation systems with sustained safety records.
- 8) Continue to publish reports on vehicle safety specifications and on the most recent safety practices, as well as studies covering such reliability issues as maintenance practices.
- 9) Secure additional federal resources for safety, security, equipment, and operations.

## B. Management and Operations

- 1) Manage and provide information on better operations and management to increase operational innovation and efficiency.
- 2) Increase the focus on improving performance, operations, and management in APTA conference programs, sessions, and meetings.
- 3) Increase education of and outreach to APTA members on the benefits of using APTA standards programs, safety audit programs, and peer reviews.
- 4) Develop and apply technology that simplifies the public transportation experience for users.
- 5) Identify affordable technologies and best practices and guidance on technology applications and better use of existing technologies.
- 6) Continue to identify opportunities for research and funding to develop new technology and more effectively apply existing technology.
- 7) Help members provide a better service, building on current APTA activities

*“We need to step up our attention to technology. We are behind the ball.”*

APTA Member

*“[We] must continue to find ways to make the fixed route system more adaptable and user friendly so that it is more attractive.”*

APTA Member

including quality-of-service peer reviews, the activities of the Ridership Experience sub-committee of the Marketing and Communications Committee, and the Urban Design Standards Task Force.

## C. Performance Measures

- 1) Continue to establish and recommend practices that promote the use of performance measures.
- 2) Advocate for changes to how data is collected and reported to the National Transit Database (NTD) to foster consistency in reporting and to allow the NTD to be used more effectively for benchmarking and performance measures.
- 3) Identify and promote new performance measures for the industry that take into account a wide range of objectives.
- 4) Enable transit board members to obtain in-depth knowledge and expertise in performance monitoring. Establish more guidance on performance management and introduce other tools to help transit agency boards more effectively monitor agency operations and management.

**2. Promote more comprehensive intermodal and multimodal transportation approaches (including bus, streetcars, light and heavy rail, paratransit, van pools, water-borne transit, intercity bus, commuter rail, intercity rail, high-speed rail, and airport access), and a broader implementation of mobility management strategies.**

**A. Expand the Knowledge Base**

- 1) Develop APTA's work plan for mobility management, increasing awareness of and providing technical assistance to members on a mobility management approach.
- 2) Offer educational sessions on interconnectivity and "the last mile" and on intermodal planning and operations, highlighting good practices.
- 3) Build on the current APTA high-speed rail program, with an expanded curriculum for APTA members, to include technical applications.
- 4) Encourage members to meet locally and regionally with other service providers/modes to develop equipment that works together (e.g., interoperability of track communications equipment and rolling stock).
- 5) Develop connections to land-use and economic-development strategies by providing guidelines, recommended practices, and training scaled to different regions, corridors, and neighborhoods.
- 6) Support APTA members in becoming better resources for their communities, offering tools to help members highlight the diversity of the services they do offer and could offer to make their communities more livable.

**B. Advocacy**

- 1) Advocate the benefits of comprehensive, multimodal transportation.
- 2) Develop strategies for creating institutional structures at federal, state, regional, and local levels that facilitate a fully integrated approach to investment decision-making, planning, and implementation of transportation across modes and sectors.
- 3) Advocate for federal regulations that support a longer-term transportation policy and vision.
- 4) Advocate for complete streets and encourage transit agencies to partner with their communities to advance and retrofit for complete streets, ensuring better access to public transportation services for all users.

## Measures of Success

- There is a decline in the number of employee, customer, and general public injuries and fatalities each year.
- There is a decline in the number of bus and rail crashes each year.
- The participation of other organizations in APTA events and projects has increased.
- More visible connections have been made among public transportation, land use, and economic development at federal, state, and local levels.
- There is a visible increase in APTA members embarking on a mobility management approach.
- New institutional structures have emerged at all levels that are geared toward integrated decision making and planning.
- There is a steady improvement in the results of rider-satisfaction surveys.
- The recognition of public transportation in complete streets policies has risen.

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## A QUALITY WORKFORCE

### Member Issues

APTA members need help identifying strategies to attract and retain the right workforce, improve training and development, think more unconventionally on labor relations, change organizational cultures, and develop workforce performance metrics.

*“The public transportation industry has career appeal to a new, diverse population of the best and the brightest.”*

*TransitVision 2050*

**APTA GOAL → Help members attract, develop, and retain a diverse workforce able to deliver high-quality performance that effectively and efficiently responds to the evolving needs of public transportation customers.**

### APTA Objectives and Action Plan

1. **Support the development of a public transportation industry workforce capable of meeting evolving demands of the industry and the evolving expectations of public transportation customers.**

#### A. Knowledge Transfer

- 1) Conduct periodic scans of the challenges, gaps, and opportunities in workforce development to provide members with data on the impact of the public transportation industry in job creation and retention, including data on turnover in the industry’s workforce.
- 2) Continue to research and disseminate successful best practices on organizational management, recruitment and retention, and labor-management relations to promote a modern public transportation industry.
- 3) Develop member services on career and succession planning, e.g., developing succession planning seminars and toolkits.
- 4) Develop a program augmenting workforce exposure to both the public and private sectors.
- 5) Continue partnerships on workforce development with labor, academia, federal agencies, and other organizations, including the Conference of Minority Transportation Officials, Women’s Transportation Seminar, National Transit Institute, Eno Transportation Foundation, and the Transportation Learning Center.
- 7) Leverage APTA’s website as a platform for sharing and promoting industry workforce resources.
- 8) Develop more training programs on specific skills sets—e.g., supervisory/leadership training, technical training for maintenance.

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## B. Workforce Recruitment

- 1) Continue reaching out to the next generation workforce, raising awareness of public transportation career opportunities, and promoting the benefits of working at a public transportation agency or public transportation-related business.
- 2) Strengthen relationships with educational institutions so that their basic curricula offer studies in transportation policy, history, and planning, as well as technical areas relating to urban, rural, and intercity public transportation.
- 3) Provide a forum for input from students on how the industry can attract and retain new employees.
- 4) Develop a comprehensive outreach program for college students using the APTA Youth Summit model.
- 5) Create targeted recruitment programs for diverse hiring pools that include women, minorities, younger generations, mature workers, and people with disabilities.
- 6) Establish mentorship programs within APTA and within and among APTA member organizations.

*“We need effective strategies, including image branding and internships to recruit and retain the next generation.”*

APTA Member

## C. National Programs

- 1) Establish an APTA internship program that fully engages the broadest range of APTA members, including the development of “joint internships” for college students to rotate between transit systems and the private sector, increasing the potential for qualified students to pursue a career in public transportation.
- 2) Expand APTA’s youth outreach efforts through partnerships with youth organizations (e.g., Boys and Girls Clubs, Junior Achievement) and through APTA programs (e.g., the American Public Transportation Foundation and Leadership APTA).
- 3) Maximize the cooperative agreement with the Council of University Transportation Centers (CUTC) and other universities, community colleges, and technical schools to have students present applied transit-related research at APTA events.
- 4) Seek passage of an authorization legislation that includes APTA’s workforce development recommendations.

## D. Workforce Development

- 1) Leverage recommendations from the APTA Blue Ribbon Panel on Workforce Development and the findings of the APTA Preliminary Workforce Skill Development Needs Report.

- 2) Develop more training on specialized skill sets for transit management, board members, and businesses.
  - 3) Establish a forum for members to bridge the generational gaps in their organizations, including developing resources to respond to knowledge and skill gaps based on retirements or major changes in the industry.
  - 4) Develop partnerships with all modes of transportation (e.g., aviation, maritime, freight, and other high-growth industries), including advanced manufacturing, healthcare, and biotechnology, to share best practices on addressing skill shortages.
  - 5) Identify impacts on the private sector’s ability to recruit and retain a quality workforce given opportunities in public transportation and the federal government.
- E. Needs Assessment**
- 1) Assemble leaders from inside and outside the industry to address key issues, including generational challenges in workforce recruitment and retention in the transit industry.
  - 2) Continue to professionalize and broaden the credentialing offered by APTA through sessions at APTA events.
  - 3) Advise APTA members on legislation affecting funding for workforce development, employee care, and employee welfare.
  - 4) Identify and pursue non-DOT funding sources (e.g. via such U.S. agencies as the Departments of Labor, Energy, and Education, and the Environmental Protection Agency).
- F. Recognition Programs**
- 1) Continue individual and system award programs that recognize those in the transit industry with exemplary retention and development programs.
  - 2) Continue the APTA AdWheel program, which recognizes outstanding efforts in marketing and advertising among transit agencies and businesses.
- 2. Support the widespread establishment of customer-oriented management cultures within public transportation agencies.**
- A. Develop training programs and problem-solving workshops for APTA members on best practices to establish effective customer-oriented management cultures building on international and national experience.
  - B. Continue to incorporate project management skills into APTA conferences as a subset of management style/practices.

*“Create the gold standard for customer service that can be used by all.”*

**APTA Member**

- C. Implement Quality Service Task Force recommendations to establish a customer focus on performance measurements within public transportation agencies and encourage the deployment of comprehensive management systems (such as ISO 9001) to pursue organizational quality.
- D. Continue to develop recognition programs for frontline staff on customer service skills, including the encouragement of member participation in APTA Customer Service and Call Center challenges.

## Measures of Success

- There is a significant increase in the degree to which APTA is used as a tool for professional growth, via participation in such activities as its conferences, committee involvement, and leadership programs.
- Steady increases are seen in the number of graduates from training programs developed by APTA as well as NTI courses.
- Steady increases are seen in the number of students/graduates in various transportation-related studies and in the number who pursue careers in public transportation.
- The number of relationships with college and technical schools offering transit-supportive programs has increased.
- Federal legislation to support workforce development activities has been enacted.
- The numbers of certifications conveyed via APTA conferences and workshops has risen.
- There is widespread implementation of the recommendations of APTA's Quality of Service Task Force.
- More public transportation information is available in Department of Labor statistics.
- Aggregate funding by APTA members for professional development of their staff has risen.
- The number of college and university members of APTA has doubled.

## PUBLIC TRANSPORTATION: ESSENTIAL VALUE TO ALL

### Member Issues

APTA members call for APTA to help tell our story, position transportation as a top issue, increase marketing and communication, and build partnerships.

**APTA GOAL** → Ensure that a critical mass of key stakeholders understands how public transportation is essential to the social, environmental, and economic quality of life and communicates that value.

*“There is a near universal attitude that green transportation and land use choices are best for the environment and for the planet,... making communities more livable and enjoyable.”*

*TransitVision 2050*

### APTA Objectives and Action Plan

1. **Generate among the public and other stakeholders a broad understanding of the benefits of public transportation.**

#### A. Advancing Policy Goals

- 1) Continue to educate and persuade key stakeholders on the link among public transportation and other public priorities, such as climate change, aging in place, energy independence, economic development, and job creation, and how public transportation contributes to individual and community quality of life and sustainability.
- 2) Continue to engage lawmakers to raise awareness of public transportation’s value and its contribution to addressing critical national transportation issues.
- 3) Work to define elements of a national transit system that complement the existing national highway system, including those elements of public transportation systems that are of national and regional significance.

#### B. Messages

- 1) Invest more in the branding necessary to change public awareness and perception of public transportation.
- 2) Develop materials and tools that APTA members and stakeholders can use and adapt to their specific areas of influence.
- 3) Continue to establish marketing campaigns with consistent messages in telling our story about the value of public transportation.
- 4) Continue to conduct research to understand public awareness and perceptions of public transportation.
- 5) Conduct national research on key issues which will resonate and can be replicated at the state and local level.

*“Change the image of transit as a social service agency to a problem solver for mobility needs.”*

**APTA Member**

**C. Knowledge Transfer**

- 1) Continue to communicate with the public through [www.publictransportation.org](http://www.publictransportation.org) and other avenues.
- 2) Learn from and replicate, when possible, successful international examples to better tell our story.
- 3) Develop programs to educate youth about how transit works and benefits them.

**2. Develop partnerships with other organizations to stress the value of public transportation.****A. Stakeholders**

- 1) Develop new strategic partnerships with industries and associations that should have a strong interest in public transportation but with whom we have not traditionally worked, such as health care.
- 1) Establish additional coalitions and advocacy-focused groups to communicate the advantages of public transportation to the public.
- 2) Strengthen collaboration with schools on public transportation and public transportation issues.
- 3) Continue to engage in collaboration around common goals with such organizations as the American Association of State Highway and Transportation Officials, the U.S. Chamber of Commerce, the Amalgamated Transit Union, the Natural Resources Defense Council, the Energy Environment Systems Institute, Transportation for America, AARP, and the Transportation and Livable Communities Consortium.

**B. Knowledge Exchange**

- 1) Evaluate existing relationships and conduct a scan of traditional and non-traditional organizations that would offer improved or new opportunities for collaboration – and pursue those opportunities.
- 2) Identify best practices among APTA members in forming local partnerships, including with chambers of commerce.
- 3) Continue to attract and promote international speakers and presenters during APTA conferences and meetings and develop strategic partnerships with the international transit industry.

## Measures of Success

- Quality partnerships have increased significantly with organizations and associations with which APTA has not previously collaborated.
- Public transportation has more visibly become a part of the agenda of other sectors (e.g., energy, health, education, and labor).
- Pro-transit ballot initiatives continue to be passed across the country.
- There is a significant increase in third-party material (i.e., non-APTA) that features the four key elements of APTA’s main message on public transportation’s contribution to:
  - Economy—generating jobs;
  - Environment—improving air quality and reducing greenhouse gases;
  - Energy—helping the nation become more energy efficient and less dependent on foreign oil;
  - Quality of Life—reducing congestion and increasing mobility.

DRAFT

## EXISTING APTA SERVICES SUPPORTING THE 2010-2014 STRATEGIC GOALS

The 2010-2014 APTA Strategic Plan is building on many of APTA's existing services and programs as highlighted below.

A complete list of APTA services can be found on the APTA website at:  
[www.apta.com/members/memberprogramsandservices](http://www.apta.com/members/memberprogramsandservices)

### Economic Sustainability

APTA communicates the need for more and better dedicated federal funding using APTA's authorization principles.

Recent policy papers and research that support advocacy for more generous appropriations include the report on “The Economic Impact of Public Transportation Investment” showing how increased investment in public transportation provides good green jobs, wages and business income. APTA is also tracking and reporting on the economic benefits of bus and rail manufacturing in the U.S. Forthcoming is a paper on the importance of a predictable and certain federal flow of funds.

At the state and local level, APTA is working with its state affairs committee to have transit agencies play an important role in advocating at state level, working with the National Conference of State Legislators to educate state legislators on the important role public transportation plays and partnering with state transit associations as well as the annual State Public Transit Partnerships Conference. APTA also actively tracks state and local referendums and supports the creation of local transit coalitions.

APTA is working with the Transportation Research Board (TRB) and other partners to explore all transportation financing options and how they might have a role in financing the future of public transportation.

The recent creation of APTA's new cross-cutting committee on PPPs is offering a broader platform for cooperation between the public and private sector.

Through the business member procurement committee, the implementation of procurement standards and best practices is being advanced, as well as the need for procurement reform and non-adversarial procurement practices.

APTA's new brochure on “The Case for Business Investment in Public Transportation” lays out what the critical issues are for private investors as they consider investing in the public transportation industry.

APTA offers an online directory of transit products and services, COMPS, with over 800 member manufacturers, suppliers, consultants and contractors listed.

Through the development of communications and marketing resources and the annual marketing and communications workshop, APTA continues to work to help the industry to increase and retain ridership.

APTA has recently created a compendium of local public transportation projects financed through the American Recovery and Reinvestment Act.

### **Environmental Sustainability**

Through APTA’s Sustainability and Urban Design Standards, draft sustainability guidelines have been established for the transit industry as has a recommended practice for measuring Greenhouse Gas Emissions. Further standards are in development on joint development and visioning processes, land use and access areas around transit facilities and multi-modal guidance for access to transit facilities.

APTA’s annual sustainability workshop has been bringing together transit industry sustainability champions to exchange good practice and the concrete benefits of sustainability projects in the industry.

In 2009, APTA launched the pilot phase of the APTA sustainability commitment designed to establish a benchmark for the industry on core practices that enable success in sustainability and to give recognition for industry achievements.

Existing policy papers and research by APTA set out the contribution of the transit industry to energy efficiency and Greenhouse Gas Reductions. APTA has partnered with others to publish the “Moving Cooler” report which shows the critical role of public transportation and land-use as part of a broader transportation strategy for carbon emission reductions.

APTA has strengthened relationships with the Environmental Protection Agency (EPA) and the Department of Housing and Urban Development (HUD) through the new EPA-HUD-DOT livability initiative and sustainable communities’ partnership.

### **Safe and Reliable Mobility Systems**

Through its Security Affairs Steering Committee, APTA interfaces with the federal government on security policy issues including grants, training and technology.

APTA’s standards working groups continue to develop safety and security standards for the industry, as well as refine and focus standards in areas of operations, accessibility,

communications, and in new areas such as energy, power and traction systems, and efficiency. To date, APTA has developed over 170 standards for the industry in conjunction with public transit industry professionals, technical experts, labor representatives, the federal government and other professional organizations

APTA continues to hold peer reviews and safety management audits for its members.

APTA continues to coordinate industry response to, and implementation of, various statutory mandates of the Rail Safety Improvement Act of 2008, including positive train control, passenger rail hours of service, conductor certification, risk reduction programs, and others.

The APTA Emergency Response & Preparedness Program (ERPP) is a voluntary mutual aid program that has been established in cooperation with the Federal Transit Administration. Currently there are over 200 transit agencies that are listed with the program that have agreed to provide support through mobilization of equipment and personnel resources in times of emergency need.

Through its quality service initiative, APTA is developing a program to recognize industry achievements in quality service.

With the creation of APTA's new cross-cutting Mobility Management Committee, APTA is strengthening its role in defining and facilitating a mobility management approach for its members.

The annual multi-modal operations planning workshop continues to offer a platform for exchange of expertise.

High Speed Rail is the focus of numerous APTA advocacy and training efforts including the International Practicum on Implementing High-Speed Rail in the United States.

## **A Quality Workforce**

As part of the work of APTA's Workforce Development Blue Ribbon Panel, numerous action plans and initiatives are being established to guide APTA and the industry's agenda for the next 5 – 10 years including new programs and services to address: image/branding; higher education issues; youth outreach and awareness; leveraging partnerships and collaborations; measuring the return on investment of training and development for transit employees; and the impact of authorization and other legislative proposals.

APTA's leadership programs with partners, along with the Leadership APTA program, offer educational resources to the industry, including specific programs for transit CEOs and board members.

Through its youth outreach program, APTA links a diverse group of high school junior and senior students from across the country to explore the environmental and community benefits of public transportation and career opportunities in the industry.

APTA continues to support labor-management and other training partnerships for operations and maintenance employees through the development of training standards, web-based technical training courses, and other resources to address the industry's skill challenges.

Through its quality service initiative, APTA is developing a toolkit for strengthening customer service quality.

### **Public Transportation: An Essential Value to All**

APTA builds support for public transportation policies and investment at the federal and local levels through the Research, Communications and Advocacy Program and through its media relations efforts. Key programs include Earth Day-related events, Dump the Pump, Transportation Tuesdays, the “Go Green, Go Public” PSA campaign, the Transit Savings report and the Green Travel Forecast.

APTA has been conducting an integrated campaign, “Public Transportation Takes Us there” promoting the energy, environmental, economic and environmental benefits of public transportation and linking them to national issues. Print advertisements have been developed that can be customized for local use by members. In addition, facts sheets, talking points, and press release templates are available that members can download.

APTA's recently formed “Telling our Story” Task Force is launching actions to strengthen the emotional connection with public transportation through personal stories and testimonials and using social media tools

APTA continues to build its public portal, [www.publictransportation.org](http://www.publictransportation.org), to make it the source for public transportation information for the general public.

APTA has steadily increased its partnerships in the social, environmental and economic arena. As part of this, each year APTA exhibits at such conferences, as AARP, the National League of Cities and Partners for Smart Growth. We also undertake joint research and develop materials with partners such as the Environmental Defense Fund and the Sierra Group.

## CONCLUSION

Meeting the five strategic goals outlined in this Strategic Plan will require the full attention of APTA and the full engagement of APTA’s membership. If we are successful in implementing this plan, APTA will have contributed to its members by ensuring:

1. Greater economic security
2. Widespread recognition of public transportation’s role in individual and community sustainability
3. A greener industry
4. A new standard of performance focused on safety, efficiency, and customer service
5. An industry where multimodal and mobility management approaches are common practice
6. A workforce better prepared to meet the needs of the industry and those it serves
7. A well established appreciation of the full range of benefits that public transportation brings to society

In so doing, APTA, its members, and the public transportation industry will be well on the way to achieving the vision set out in the *TransitVision 2050* report:

**“In 2050 America’s energy efficient, multi-modal, environmentally sustainable transportation system powers the greatest nation on earth.”**

## APTA STRATEGIC PLANNING STEERING COMMITTEE

In November 2008, the APTA Executive Committee created a Strategic Planning Steering Committee. The majority are members of the APTA Executive Committee. This Steering Committee has been given the mandate to guide APTA through the development of its 2010-2014 Strategic Plan.

### Strategic Planning Leadership

#### Chair 2008-2009

**MATTIE “M.P.” CARTER**  
Memphis Area Transit  
Authority  
Memphis, TN

#### Chair 2009-2010

**MICHAEL J. SCANLON**  
San Mateo County Transit  
District and Peninsula  
Corridor Joint Powers Board  
San Carlos, CA

#### Members 2008-2010

**LINDA BOHLINGER**  
HNTB Corporation  
Santa Ana, CA

**GREG EVANS**  
Lane Transit District  
Eugene, OR

**MICHAEL SANDERS**  
Connecticut Department of  
Transportation  
Newington, CT

**FLORA M. CASTILLO**  
New Jersey Transit  
Corporation  
Newark, NJ

**SHARON GREENE**  
Sharon Greene & Associates  
Laguna Beach, CA

**GARY C. THOMAS**  
Dallas Area Rapid Transit  
Dallas, TX

**THOMAS J. COSTELLO**  
Champaign-Urbana Mass  
Transit District  
Urbana, IL

**DELON HAMPTON**  
Delon Hampton &  
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