

SOUTH WEST TRANSIT ASSOCIATION
Strategic Plan
February 19, 2008

This Draft Strategic Plan was adopted for Review and Comment by the SWTA Strategic Plan Task Force in Houston on January 18, 2008. The adoption of the Strategic Plan was approved by the SWTA Executive Board on Tuesday, February 19, 2008, immediately following the Annual Membership Meeting.

South West Transit Association Strategic Plan

The Strategic Plan is intended to guide the decisions and actions of the SWTA Board, staff, and organization. Priorities and schedules are not defined but will be addressed annually by the Board through the budgeting and work program process.

Mission Statement

The mission statement is adopted by the Board and should be reviewed annually and ratified or changed. The Mission Statement of SWTA is to:

Provide a community of education, communication, and advocacy in which members can strengthen their ability to provide public transportation services and products.

As a part of pursuing this mission SWTA will take advantage of regional economies as well as regional similarities and diversities.

Statement of Purpose

The South West Transit Association will continue to improve and expand services available to members such that members are enabled to:

- develop professional and well trained staff, as well as industry leaders for the future.
- secure unprecedented support and funding for public transportation in the region
- elevate awareness of public transportation benefits to the community
- create economic development in their communities

In doing so, the Association will:

- grow in membership, participation, and possibly in geographic area
- be more widely recognized and respected as an organization having an impact on the industry
- be on the cutting edge in technical issues and other subjects.

The Statement of Purpose is the foundation of the SWTA Vision, which is:

*****Okay, Task Force Members---Give us a slogan!

Examples:

“Double the Ridership by 2025”

“Resources for Our Region”

“SWTA Nation!”

Your Entry Here: _____

Core Values

While the South West Transit Association certainly embraces such standard values as integrity, excellence, honesty, accountability, diversity, innovation, our planning process identified some values which make SWTA unique. SWTA also values:

- our regional nature and strength
- our culture of friendliness, approachability, and enthusiastic idea sharing
- our ability to provide more personal and customized services to members
- our no-frills, economical and efficient member services
- our ability to have fun and not always take ourselves seriously

Strategic Goals-Summary

Advocacy

Articulate the common member issues of legislation, regulation, reauthorization, appropriations and then ensure that SWTA is the recognized credible source for regional information and advocacy of those issues.

Association Management and Administration

Use all appropriate association practices and policies taking maximum possible advantage of current technology.

Finance

Increase the operating financial stability through frequent review of the dues policy, maintenance of a reasonable operating reserve fund, and other fiduciary actions of the Board and staff

Learning and Growth

Refine comprehensive training program in order to add value to membership services.

Appendix—Details of Strategic Goals

This section will form the starting point for annual Action Plans to ensure the goals are met but are pursued on a priority basis that recognizes the financial resources and limitations of the organization.

Strategic Goals—Details

GOAL: Advocacy

Articulate the common member issues of legislation, regulation, reauthorization, appropriations and then ensure that SWTA is the recognized credible source for regional information and advocacy those issues.

Objective

Identify membership issues.

Indicator

Completed federal legislative agenda an advocacy plan

Strategies

- have an active legislative committee
- seek membership input

Objective

Establish regular communication with members, media, APTA and CTAA, state associations and federal government and congressional offices.

Indicator

Implementation of an advocacy plan

Strategies

- update and reactivate use of data base for federal legislative communications
- establish system for easy email alerts to congressional offices and to members
- develop a library of resources and information for members
- update media list

- work closely to coordinate with national and state associations, and take advantage of ways in which associations can work together

GOAL: Association Management and Administration

Use all appropriate association practices and policies taking maximum possible advantage of current technology.

Objective

Achieve enhanced use and capabilities of Internet and email technology.

Indicator

Completed technology plan

Strategies

- develop e-newsletter; assess appropriateness of e-newsletters for all members
- evaluate and implement appropriate use of the Internet to deliver training programs
- keep Web site up to date
- explore new Web site and email capabilities with respect to payments, event registration, distribution of information, and member communication
- evaluate current computer equipment and determine any needs

Objective

Practice all appropriate association practices and policies.

Indicator

Updated by-laws and a completed employee handbook

Strategies

- conduct a comprehensive review of by-laws
- develop an employee handbook of association policies and practices
- stay up-to-date on practices through appropriate staff training and participation in professional organizations such as the American Public Transportation Association's state affairs committee, and local and state Societies of Association Executives
- develop annual goals and evaluate progress toward them each year

- customer satisfaction and emerging needs

GOAL: Finance

Increase the operating financial stability through frequent review of the dues policy, maintenance of a reasonable operating reserve fund, and other fiduciary actions of the Board and staff

Objective

Increase revenues.

Indicator

Financial reports showing increased revenue

Strategies

- increase membership (all categories)
 - expand membership markets—develop universe of potential membership
 - evaluate geographic expansion of the association
 - survey former SWTA members
 - research membership rosters of other transit associations
 - focus on rural membership and services offered to them
 - enhance membership benefits
- increase event attendance
 - expand marketing
 - enhance value of programs
- identify potential new sources for training funding
- assess current dues structure and adjust it to meet financial objectives; make adjustments that reflect inflation
- research dues structures for other transit associations
- survey a sample of SWTA members on dues sensitivity
- explore new income-producing events

Objective

Minimize expenses where possible in ways that do not compromise member services.

Indicator

Financial reports showing revenues exceeding expenses

Strategies

- make appropriate use of technology for cost savings and efficiencies
- encourage membership (all categories) to provide enhanced in-kind services

GOAL: Learning and Growth

Refine comprehensive training program in order to add value to membership services.

Objective

Reinvent the SWTA training program.

Indicator

Completed training program plan

Strategies

- develop a training and education committee
- conduct a training needs assessment of members
- conduct an analysis of current training programs, including where else similar training may be available
- assess appropriate training topics and delivery methods
- develop a training program which addresses members' needs while taking advantage of regional economies as well as regional similarities and diversities

Objective

Continually evaluate training program.

Indicator

Updates to the training program plan

Strategies

- solicit evaluations and feedback from training participants
- conduct ongoing member surveys to determine customer satisfaction and emerging needs and issues.