

A side-view photograph of an orange transit bus with a white stripe. The bus is in motion, as indicated by the blurred background. The word "Local" is partially visible on the side. The route number "26 EL MONTE" is displayed on the front window. A sign above the door reads "Welcome Aboard Bienvenidos Exact Fare Please Tenga Por Favor Exacto Por Favor".

# CALIFORNIA TRANSIT ASSOCIATION STRATEGIC PLAN 2023-2028

NOVEMBER 2022



CaliforniaTransit  
Association





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# Acknowledgements

## CALIFORNIA TRANSIT ASSOCIATION EXECUTIVE COMMITTEE

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**Vice Chair, Sharon Cooney,** *San Diego Metropolitan Transit System*

**Mona Babauta,** *Golden Gate Bridge, Highway & Transportation District*

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## LETTER FROM THE CHAIR

Members, California Transit Association:

On behalf of the California Transit Association's Executive Committee, it is my pleasure to share with you the Association's *Strategic Plan for 2023 to 2028*.

This update to our strategic plan comes at a pivotal time for our industry. It will serve to guide us as we continue to grapple with the impacts of the COVID-19 pandemic on our operations, workforce, and financial outlook and as we endeavor to advance an ambitious agenda that will lead our industry to recovery and long-term sustainability. Like earlier strategic plans, this update will give direction to the Association's work to further our longstanding goals of influencing state and federal decision makers to enact policies and funding solutions that support public transit; delivering industry-leading educational opportunities and member services; and maintaining a financially healthy, innovative, and stable organization. Importantly, this update to the strategic plan ensconces – for the first time – our association's commitment to furthering diversity, equity, inclusion, and access. In doing so, this update recognizes that, as an industry, we have much progress to make to ensure that our agencies and organizations reflect the diversity of our communities, that our projects and services support and uplift the most vulnerable, and that all Californians share the benefits of our recovery.

In the years ahead, this strategic plan will inform the development of our annual work program, our annual budget, and our annual legislative programs, guaranteeing that the Association's focus and resources remain directed at delivering on our industry's highest order priorities and objectives. This Strategic Plan will also help the Association remain accountable to you, our members.

Thank you for your continued trust in, and support for, the California Transit Association.

Sincerely,

A handwritten signature in blue ink that reads "Karen H. King". The signature is written in a cursive, flowing style.

**Karen H. King**

*Chair, California Transit Association  
CEO, Golden Empire Transit District*

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Bike  
Car

PLEASE WAIT  
YELLOW LINE



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# Introduction

## **ABOUT THE CALIFORNIA TRANSIT ASSOCIATION**

The California Transit Association (Association) is the leading advocacy organization and champion for public transit in California. The Association's more than 220 member organizations include transit operators, commuter rail agencies, transit support groups, national and international transit suppliers, and government agencies. With a motivated and informed membership base, the Association actively engages State decision makers to shape transit-friendly policy, secure increased transit funding and promote the benefits of a balanced transportation system.



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## PURPOSE OF THE STRATEGIC PLAN

We are living in a time of immense disruption and transition. Climate change, the ongoing pandemic, shifting demographic trends, the emergence and growth of digital platforms to access services, and ongoing efforts to address structural racism and social inequity will continue to influence how we live, work and travel in the coming years. Our Strategic Plan helps the Association meet this moment by refining our shared values, vision, purpose and commitments to our Association membership, the transit industry, and our communities.

As the guiding document for our work over the next five years, the Association's Strategic Plan serves as a blueprint to help us meet our goals—successful and continued advocacy for sustainable transit; unsurpassed educational and networking opportunities for our members; maintaining an effective and efficient organization; and expanding our commitment to diversity, equity, inclusion, and accessibility in our work and to the benefit of the communities we serve.

The Strategic Plan informs the annual workplans undertaken by Association staff on an annual basis.





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## PLANNING PROCESS OVERVIEW

From May 2022 to October 2022, the Association's Executive Committee leadership, member representatives, and staff conducted a series of meetings, one-on-one interviews, and working sessions to craft this Strategic Plan. Our planning process included four phases:



### PHASE 1 **Assessment**

Define our shared outcomes for the process and identify issues and priorities for the future through a range of engagement activities.



### PHASE 2 **Creating the Plan Framework**

Review and refine the organization's vision, mission, and values, and develop goals for the next five years.



### PHASE 3 **Strategy Development**

Develop strategies to meet these goals and performance measures to serve as milestones along the way.



### PHASE 4 **Strategic Plan Preparation**

Complete the draft and final plan.







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# The Association's Recent Major Accomplishments

The Association has accomplished numerous goals across a range of issues. Some recent achievements are highlighted here:

## **ADVOCACY**

In the last several years, the Association ensured the success of transit-supportive legislation and regulations, defeated policies adverse to transit, and continually increased funding for transit in the State budget. Most notable during the last Strategic Plan period was the passage and enactment of Senate Bill 1, historic legislation which provided the largest infusion of funding to transit since the enactment of the Transportation Development Act, and our work to secure billions of dollars in transit capital funding from the state's general fund. The Association also enhanced our federal presence, ensuring the voice of California's transit industry is heard on Capitol Hill. We constructively engaged with the California Air Resources Board (CARB), the California

Energy Commission and the California Public Utilities Commission to shape and support our industry's transition to zero-emission technologies, including through the Innovative Clean Transit (ICT) Regulation.

## **COVID RESPONSE**

The Association lobbied for and helped secure emergency funding support from Congress, allowing transit agencies to maintain essential transit services. We also secured significant state statutory relief that lessened administrative burdens and changes to funding allocations for agencies at the height of the pandemic. The Association pursued and secured early access to vaccines for our frontline transit workers and helped shape COVID-19 workplace standards.



## MEMBER ENGAGEMENT

The Association enhanced information sharing through events, conferences, webinars, and publications. Annual conferences, lobby days, trainings and other events and publications provided opportunities for members to network, share and learn about best practices, and work together to advocate for public transit.

## TOPIC SPECIFIC TASK FORCES AND COMMITTEES

The Association created a ZEV Task Force, the TDA Reform Task Force and the COVID-19 Emergency Crisis Relief Task Force to respond to pressing issues affecting members and lift up their ideas and recommendations.

## LEADERSHIP TRANSITION

There is new leadership at the helm of the Association's Executive Committee, and a new Executive Director was elevated to lead the Association's work and organizational development.







## IDEA TASK FORCE REPORT AND RECOMMENDATIONS

In May 2021, the Association's Task Force on an Inclusive, Diverse, and Equitable Association (IDEA), delivered a report with recommendations linked to key goals in the Association's Strategic Plan.

These include:

**Advocacy:** Conduct an equity analysis as part of the review of legislative bill proposals considered for inclusion in State and Federal Legislative Programs and for legislation introduced in the State Legislature and Congress.

**Member Services:** Prioritize racial and social justice, transportation equity, and the furtherance of workforce equity in the Association's Educational Content Delivery Plan, including events of all sizes, publications, and annual programming.

**Organizational Management and Development:** Amend the Association's Strategic Plan and ensure Association members of diverse backgrounds participate on all standing committees.



Metro Local

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EL MONTE

metro.net

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Welcome Aboard  
Bienvenidos  
Exact Fare Please  
Tenga Por Favor Exacto Por Favor

CA 37363





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# Major Challenges and Opportunities Facing the Public Transit Industry

Members of the Executive Committee and Strategic Planning Task Force have identified the following challenges and opportunities that influence the work of the Association. These conditions impact both the day-to-day operations of our members and the long-term viability of the industry. They also inform the economic, political, and regulatory environments in which the Association operates.

**Sustainable Funding for transit is the overarching priority of the Association and our member agencies.**

Secure, ongoing, and sustainable funding allows agencies to preserve, maintain, and expand service and ensure we can provide mobility options to those who depend on transit. While funding for capital projects is often readily available, it is competitive and discrete in nature, creating challenges for long-term planning. Ongoing funds are needed to cover the full costs of transit operations, where on average only

about one-third of funding comes from passenger fares.<sup>1</sup> California's Senate Bill 1 (SB 1) in 2017 provided the first significant funding increase for transportation in twenty years and will provide approximately \$7.5 billion to help fund transit operations and capital through 2027.<sup>2</sup> Additionally, the 2022-23 state budget includes nearly \$8 billion for public transit and rail projects across California, but there is a continued need for other ongoing sources of dedicated funding to maintain and expand transit services.

<sup>1</sup> See "Fare-Related Revenues vs. Expenses (Percentage) Requirement or Goal," American Public Transit Association, Public Transportation Fare Database, 2019

<sup>2</sup> [Senate Bill 1 \(SB 1\) | CTC \(ca.gov\)](#)



## **ASSOCIATION-SPONSORED BILLS SIGNED INTO LAW UNDER THE LAST STRATEGIC PLAN:**

### **SB 614 (Hertzberg, 2017)**

Public Transportation Agencies:  
Administrative Penalties.

### **AB 1113 (Bloom, 2017) State Transit Assistance.**

### **AB 3124 (Bloom, 2018)**

Vehicles: Length Limitations:  
Buses: Bicycle Transportation  
Devices.

### **SB 1119 (Beall, 2018) Low Carbon Transit Operations Program.**

### **AB 90 (Committee on Budget, 2020)**

Transportation–Statutory  
Relief.

### **AB 107 (Committee on Budget, 2020)**

Transportation–Statutory  
Relief.

### **AB 149 (Committee on Budget, 2021) Transportation– Statutory Relief.**

### **AB 917 (Bloom, 2021)**

Vehicles: Video Imaging of  
Parking Violations.

### **SB 922 (Wiener, 2022) CEQA: Exemptions: Transportation– Related Projects.**

### **SB 942 (Newman, 2022) Low Carbon Transit Operations Program: Free or Reduced Fare Transit Programs.**

### **AB 2622 (Mullin, 2022) Sales and Use Tax Exemption: Transit Buses.**

## **Legislative Advocacy is how we ensure public transit is fully funded and accessible to all.**

We continue to educate and actively engage policy makers, voters, riders, and the communities we serve about the need for sustainable and long-term funding sources for transit, transit-supportive legislation and regulations, and a balanced transportation system. Additionally, we commit to centering racial justice and equity in our legislative agenda to ensure that we can serve members of our communities who depend on public transit to get to work, school, the doctor, the grocery store, and other necessary services.

## **Workforce Retention and Recruitment is an issue for the industry due to an aging workforce and the COVID-19 pandemic.**

The average age of transit operators nationwide is 53 years old.<sup>3</sup> The COVID-19 pandemic has accelerated retirements and other worker departures due to driver burnout, COVID-related health and safety issues, and stress from dealing with the public. But hiring and retaining new drivers is an ongoing issue for agencies given competition from better paying industries like warehousing, the variability of work schedules especially for new workers, and the lack of affordable housing in communities where operators work. Nearly all transit agencies (96%) are having trouble hiring enough new employees, and two-thirds are finding it hard to retain staff.<sup>4</sup> Agencies need

<sup>3</sup> American Public Transportation Association, *Transit Workforce Shortage: Root Causes, Potential Solutions, and the Road Ahead*, October 2022

<sup>4</sup> American Public Transportation Association, *Transit Workforce Shortage: Root Causes, Potential Solutions, and the Road Ahead*, October 2022





**53** is the average age of bus operators in the U.S.



**96%**  
of transit agencies  
are having trouble  
hiring staff

**2/3**

find it difficult  
to retain staff

to provide competitive compensation to account for the growing costs of living, and more flexible work options to attract and retain workers.<sup>5</sup>

**The transition to Zero-Emission Vehicles (ZEV) requires more funding for infrastructure and ongoing workforce training.**

In 2018, CARB adopted the ICT regulation to help the state meet greenhouse gas emission reduction goals and air quality standards. The ICT requires transit agencies to begin phasing zero-emission buses (ZEB) into their fleets starting in 2023 for large agencies, and 2026 for smaller agencies, with full transition expected by 2040.<sup>6</sup> With the support of the Association, the recent California state budget includes tens of millions of dollars to support the ZEV transition by covering some of the cost of vehicle purchases,<sup>7</sup> and recent legislation will reduce the cost for ZEBs.<sup>8</sup>

However, there is not enough funding to support the full transition, inclusive of procuring ZEBs and developing the infrastructure needed to charge and maintain ZEB fleets. Funding is also needed for ongoing workforce training on ZEV operation and maintenance. The Association and our member agencies have helped to secure funding to develop training programs, in partnership with workforce development agencies, community colleges and other partners, but more funding is needed for their continued operation.<sup>9</sup> With continued regulatory actions by CARB, including on the Commercial Harborcraft regulation, the In-Use Locomotive regulation, and the Advanced Clean Fleets regulation, the funding challenges associated with the transition to zero-emission vehicles continues to grow.

<sup>5</sup> Jacob Herson, *Operator Shortage: Transit Agencies Are Working Hard to Tackle the Challenge*, Transit California, February 2022

<sup>6</sup> Jacob Herson, *ZEB Progress: Regulators, Operators, Advocates Work Together Toward 2040 Goal*, Transit California, June 2022

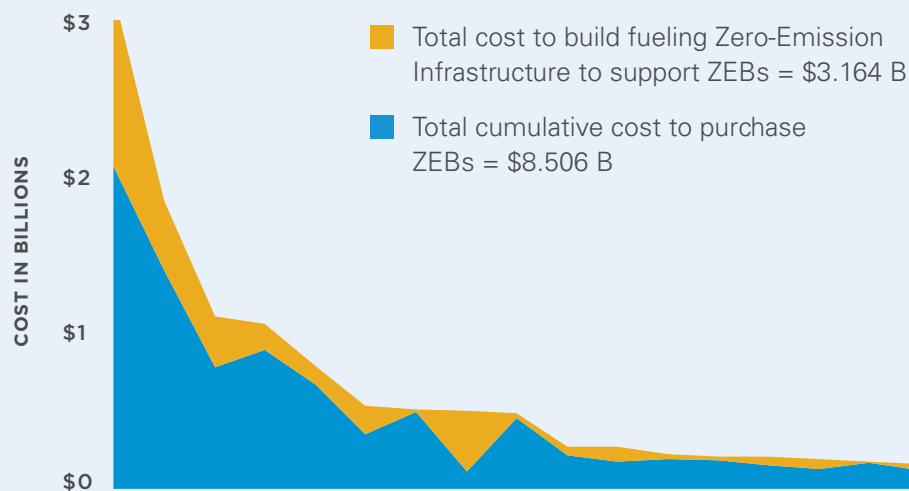
<sup>7</sup> Jacob Herson, *Billions Budgeted for Transit*, Transit California, July 2022

<sup>8</sup> California Transit Association, Governor Newsom Signs New Legislation into Law that Will Accelerate Public Transit Industry's Zero-Emission Transition, Press Release, Market Watch, September 17, 2022

<sup>9</sup> Jacob Herson, *Transit Workforce Development: FTA and State Entities Work to Help Transit Agencies Address Labor Shortages*, Transit California, June 2022



## ESTIMATED COST OF ZEB TRANSITION FOR TRANSIT AGENCIES THAT SUBMITTED ICT ROLLOUT PLAN\*



Source: CALSTART, 2021

17 California transit agencies with bus fleets provided estimates to CARB for the costs to purchase Zero Emission Buses (ZEB) for their fleets and for the fueling infrastructure to support ZEBs.

\*Note: Not all agencies submitted cost estimate information. This analysis also does not include more than 100 other CA transit agencies, ferries and locomotives affected by CARB ZEV regulations.

### Safety and security of passengers and drivers is an ongoing concern for transit agencies.

The pandemic put transit operators on the frontlines, as agencies rushed to develop health and safety protocols to keep operators and passengers safe while ensuring transit remained open for essential workers and others. The COVID-19 pandemic has exacerbated the use of transit by unhoused persons, leading to more interactions between the unhoused and transit users and operators, and a growing public perception that transit is unsafe. Unhoused individuals have long used transit and transit stations for safety and shelter; they are also transit riders, who use it to travel to work, shelters, community centers

and elsewhere.<sup>10</sup> Many agencies have developed partnerships with law enforcement and social service agencies organizations to provide services and find safe shelter alternatives for unhoused transit users. Also, the Association advocated for legislation to respond to the recent campaign to “Stop AAPI Hate” and street harassment of women and people of Asian and Pacific Islander descent in and around transit vehicles, stations, and other public places. A recent bill in the State Legislature would have required California’s ten largest transit districts to recognize street harassment as a rider safety concern and develop solutions to help mitigate harassment.<sup>11</sup>

<sup>10</sup> Anastasia Loukaitou-Sideris, *Homelessness in Transit Environments*, UCLA Institute of Transportation Studies, 2021

<sup>11</sup> Jacob Herson, *Transit Rider Harassment: SB 1161 (Min) Seeks to Address an Endemic Problem Faced by Women and Vulnerable Communities*, Transit California, March 2022



**The Association is taking action to center Diversity, Equity, and Inclusion in our work.**

Our membership, legislators, community partners, and allies are calling on us to take more explicit action as an Association to prioritize racial justice and equity in our work.

The Association's IDEA Task Force released a report in May of 2021 with a set of Diversity, Equity, and Inclusion (DEI) recommendations for the Association tied to the Association's Strategic Plan.

These include ensuring equity plays a central role in developing policy and regulatory priorities of the Association; prioritizing racial and social justice, transportation equity and workforce equity in the

Association's educational offerings, events, and publications; and making sure that the leadership and participation in the Association's standing committees reflect the diversity of the Association membership.<sup>12</sup>

**Transportation Development Act (TDA) Reforms are necessary to reflect current operations and funding conditions.**

TDA's original goal was to modernize and expand transit in California with dedicated funding streams and performance requirements for transit agencies, including a farebox recovery target. In 2018, the Association was recently asked to lead a statewide taskforce into updating the TDA to reflect

<sup>12</sup> California Transit Association IDEA Task Force, *Actions for a More Inclusive, Diverse and Equitable Association*, May 2021





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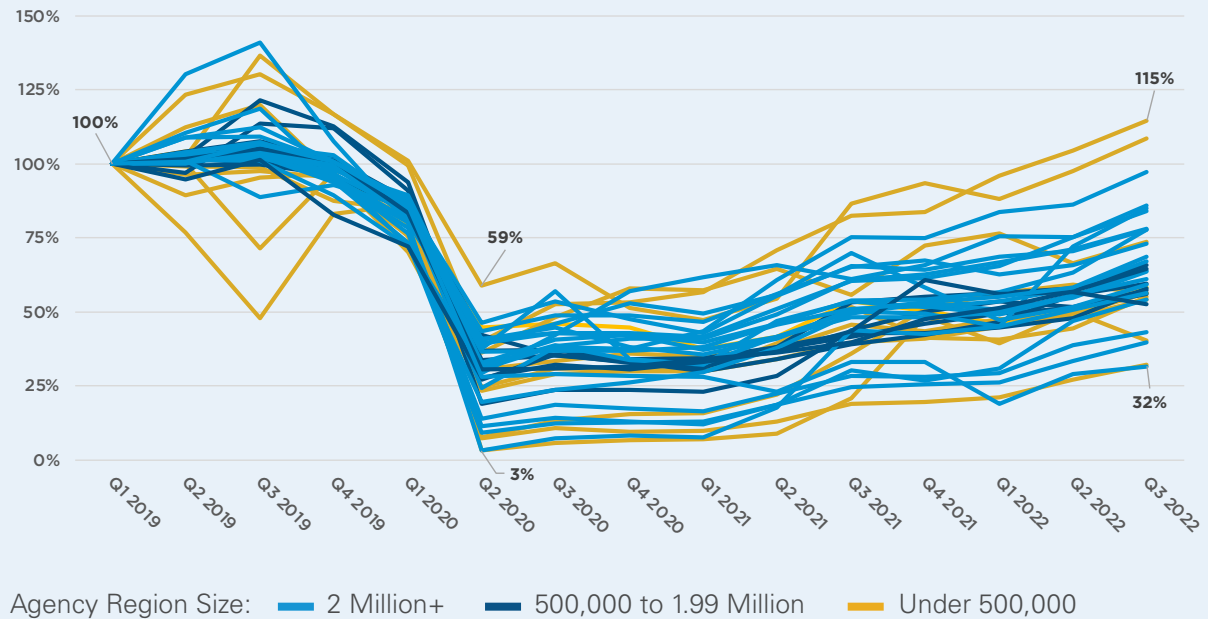
“Equity in the provision of transportation and the concept of mobility as a human right are at the core of public transit and the mission the California Transit Association’s member organizations embrace and seek to advance. We acknowledge that transportation infrastructure and mobility services have a history that includes discrimination, displacement, the dividing of communities, and the unequal distribution of benefits and impacts.”

IDEA Task Force Report, May 2021

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## RIDERSHIP LEVELS OF CALIFORNIA TRANSIT AGENCIES - PERCENTAGE COMPARISON WITH Q1 2019



Graph Source: APTA, 2022

As of Q3 2022, California transit ridership is at an average of 66 percent of the total in Q1 2019. Some agencies have returned to pre-pandemic ridership levels and above, while others continue to struggle with ridership counts that are one-third of previous totals.

<sup>13</sup> TDA Reform Update: Association Task Force Unveils Concept Framework for Possible Revision to the Landmark Funding Law, California Transit, January 2020

current conditions—including that the farebox recovery metric no longer worked as a universal measure among transit agencies to determine performance and/or need for funding support. Prior to the pandemic, the Association's TDA Reform Task Force<sup>13</sup> reviewed alternative performance metrics and developed a series of recommendations for improving TDA. Many of these recommendations were adopted by the Legislature through a series of pandemic-related budget actions pursued by the Association in 2020 and 2021. In 2023, the TDA Reform Task Force will reconvene to continue its work to reform the TDA, for action during the next legislative session.

**The transportation landscape is evolving, with the emergence and growth of mobility technology and ride share companies.** Today, many transit agencies are also looking at how to offer similar services, such as micro transit minibuses and vans, which operate on shorter routes and with similar app-based ride hailing technology. Our members are engaging with new technology on our buses and trains as well, by providing options for app-based fare payment and offering service trackers to riders.





San Francisco Bay Ferry

ARGO  
SAN FRANCISCO, CA



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# Strategic Plan Framework

The California Transit Association’s Strategic Plan is organized according to the framework illustrated and as described on the following pages. Each year, the Executive Committee reviews progress on the Strategic Plan, ongoing responsibilities and priority objectives, with assignments and timelines to ensure implementation.

## ELEMENTS OF THE STRATEGIC PLAN



### VALUES

Shared beliefs that reflect what the Association considers significant and important.



### OBJECTIVES

Specific and measurable statements of action that the Association hopes to achieve.



### VISION

The Association’s preferred future—where we strive to be.



### PERFORMANCE MEASURES

Specific measurements of progress toward goals and objectives.



### MISSION

The purpose and associated responsibilities of the Association.



### ACTIONS

A prioritized list of steps needed to accomplish goals and objectives.



### GOALS

Statements of direction toward the Association’s desired future.



### ACTION PLAN

Identifies a timeframe for completing actions, responsible parties, and required resources.



### ONGOING RESPONSIBILITIES

Ongoing and “evergreen” objectives that continue to be part of the work of the Association.



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## STRATEGIC PLAN FRAMEWORK



### Vision

Fully-funded, efficient and effective public transit systems operating in a balanced transportation network.



### Mission

Support the needs of California's public transit systems through advocacy and education.



### Values

**Ethical Behavior:** We act with honesty, openness, and fairness.

**Honesty:** We are truthful and sincere, and we promote trust and mutual respect.

**Integrity:** We are consistent in acting upon our principles and values.

**Accountability:** We hold ourselves and each other accountable to do what we say we will do, and we take responsibility for our actions.

**Service to the Public:** We work to expand access to public transit for the benefit of all Californians.

**Informed Participation:** We educate and train members and allies to be the best advocates for public transit.

**Consensus-Based Decision Making and Inclusiveness:**

We include all voices and points of view in our decision making and require consensus from our members to act.

**Diversity, Equity, Inclusion, and Access:** We commit to racial and social justice, transportation equity, the furtherance of workforce equity, and making our organization more inclusive, diverse and accessible to all.





## Goals

1

### **ADVOCACY**

Influence state and federal decision makers to enact policies and funding solutions supporting, expanding, developing, and advancing public transit.

2

### **MEMBER SERVICES**

Provide members with timely services, tools, and opportunities to enhance the strength and effectiveness of their organizations.

3

### **ORGANIZATIONAL MANAGEMENT AND DEVELOPMENT**

Strive for excellence, innovation, and stability across all facets of the Association's leadership, staff, membership, and operations.

4

### **DIVERSE, EQUITABLE, INCLUSIVE, AND ACCESSIBLE PUBLIC TRANSIT INDUSTRY**

Expand efforts within the Association and at member agencies to build a more diverse, equitable, inclusive, and accessible public transit industry.

Note: See Appendix for sample Staff Workplan Template for tracking implementation of the Strategic Plan.





## GOAL 1: ADVOCACY

**Influence state and federal decision makers to enact policies and funding solutions supporting, expanding, developing, and advancing public transit.**



### ONGOING RESPONSIBILITIES

- » Protect existing transit operations and capital funds.
- » Secure new sources of funding for transit operations and capital projects.
- » Enhance public awareness of the essential nature of public transit and build support for increased transit funding.
- » Ensure passage of transit legislation and regulations that support transit and defeat of those legislative and regulatory measures which impede transit's ability to meet the public's mobility needs.
- » Ensure the passage of legislation and regulations does not create new unfunded mandates on transit agencies.





## PRIORITY OBJECTIVES, 2023 TO 2028

- 1a.** Secure new transit operations funding to address the pandemic-induced looming fiscal cliff and support transit's recovery from the pandemic.
- 1b.** Provide support to public transit agencies in the transition to zero-emission vehicles; address agency needs for recharging/refueling infrastructure, maintenance facilities, etc.
- 1c.** Update the Transportation Development Act (TDA).
- 1d.** Enhance transit industry workforce recruitment and training efforts – for example, through engagement with Community College system State Chancellor and other educational partners to promote driver training and certification programs.
- 1e.** Address driver and passenger safety and security concerns related to inappropriate behavior on transit vehicles and at stations; address the impact of unhoused persons on transit vehicles and at stations.



## GOAL 1 PERFORMANCE MEASURES (FOCUS ON ADVOCACY AND FINANCIAL HEALTH)

**PM 1.1:** Protection of existing transit operations and capital project funding

**PM 1.2:** Expansion of funding opportunities for transit operations and capital projects

**PM 1.3:** Number of safety-related measures enacted through the Association's advocacy work

**PM 1.4:** Enactment of TDA reforms consistent with the Association's priorities

**PM 1.5:** Number of supportive workforce development measures enacted through the Association's advocacy work

**PM 1.6:** Increased funding and support for zero emission vehicle technology and integration

**PM 1.7:** Enactment of action items identified in the Association's annual state and federal legislative programs





## GOAL 2: MEMBER SERVICES

**Provide members with timely services, tools, and opportunities to enhance the strength and effectiveness of their organizations.**



### ONGOING RESPONSIBILITIES

- » Identify and address challenges and opportunities that affect Association members.
- » Support members in their efforts to increase ridership and improve the rider experience.
- » Regularly communicate with members to ensure services and activities meet their needs and expectations.
- » Ensure members benefit from education, training, and networking opportunities that incorporate diverse perspectives and encourage innovation.
- » Ensure the success of the Association's Annual Fall Conference & Expo, the premier membership engagement opportunity.
- » Expand member engagement and recruitment activities.
- » Update the Association's data management systems, communication tools, and outreach materials on a periodic basis.





## PRIORITY OBJECTIVES, 2023 TO 2028

- 2a.** Ensure that the Association's working committees and task forces are aligned with each of the priority objectives identified in the Strategic Plan.
- 2b.** Establish a business-to-business program development task force to support business members of the Association and to keep them engaged.
- 2c.** Capitalize on the Association's strong brand and identity to attract new members and sponsors; inform small and minority-owned businesses about the advantages of membership.



## GOAL 2 PERFORMANCE MEASURES (FOCUS ON MEMBERSHIP)

**PM 2.1:** Year-over-year attendance at events grows or remains stable

**PM 2.2:** Stable or increasing membership satisfaction levels (year-over-year)

**PM 2.3:** Alignment of the Association's committees and task forces with Strategic Plan priorities

**PM 2.4:** Execute the annual conference on a balanced budget





## GOAL 3: ORGANIZATIONAL MANAGEMENT AND DEVELOPMENT

**Strive for excellence, innovation, and stability across all facets of the Association’s leadership, staff, membership, and operations.**



### ONGOING RESPONSIBILITIES

- » Increase the Association’s membership levels.
- » Maintain the Association’s financial stability and accountability.
- » Work with skilled and experienced contract staff and vendors who can meet the organization’s needs.
- » Maintain a consistent review process for communication and analytical capabilities.
- » Increase the Association’s operational efficiency by Incorporation of new and innovative technology.





## PRIORITY OBJECTIVES, 2023 TO 2028

- 3a.** Increase the number of business members and encourage their active participation in Association-sponsored events and seminars, and on committees and task forces.
- 3b.** Enhance our expo hall to better respond to business member priorities such as networking.
- 3c.** Expand opportunities for the Association staff to participate in conferences and external educational programming for purposes of continuing education, business development, and brand awareness.



## GOAL 3 PERFORMANCE MEASURES (FOCUS ON ORGANIZATION)

**PM 3.1:** Retention rate of existing members

**PM 3.2:** Increase in the number of new members

**PM 3.3:** Increase in the number of business members

**PM 3.4:** Increase in revenues from dues derived through membership growth

**PM 3.5:** Balanced annual operating budget and year-end reconciliation

**PM 3.6:** Positive results in annual member satisfaction survey

**PM 3.7:** Positive annual management firm performance evaluation





## GOAL 4: DIVERSE, EQUITABLE, INCLUSIVE, AND ACCESSIBLE PUBLIC TRANSIT INDUSTRY

**Expand efforts within the Association and at member agencies to build a more diverse, equitable, inclusive, and accessible public transit industry.**



### ONGOING RESPONSIBILITIES

- » Ensure that committee and task force membership is demographically diverse and inclusive of a broad range of perspectives.
- » Ensure that the development of conference programs, educational offerings and other member services is informed by a diverse body of Association members.
- » Ensure that member participation in conferences, on committees, in policy development, and in the Association's organizational leadership is inclusive, accessible, and reflective of the Association's diverse membership.





## PRIORITY OBJECTIVES, 2023 TO 2028

- 4a.** Adopt and utilize an equity assessment tool to evaluate legislative proposals introduced at local, State and federal levels to determine the degree to which they reflect and advance transportation equity and racial justice principles.
- 4b.** Build relationships with racial and social justice and transportation equity organizations to develop policies that expand access to public transportation and improve quality of life for all riders.
- 4c.** Prioritize racial and social justice, transportation equity, and the furtherance of workforce equity in the Association's Educational Content Delivery Plan, which informs development of the Association's Annual Fall Conference & Expo, Spring Legislative Conference, Transit California e-magazine, and the Association's annual program of webinar offerings.
- 4d.** Establish a mechanism for identifying and highlighting "best practices" in policies and programs implemented by Association members that advance diversity, equity, inclusion, and accessibility.
- 4e.** Elevate best practices in recruitment and hiring, drawing on the IDEA task force report recommendations.
- 4f.** Facilitate development of internship programs and partnerships with career, technical, and vocational programs that promote job opportunities to increase diversity within the transit industry.
- 4g.** Partner with DEIA-focused organizations to learn and apply best practices.
- 4h.** Continue IDEA Task Force meetings on a quarterly basis to review work and progress on DEIA objectives.



## GOAL 4 PERFORMANCE MEASURES (FOCUS ON THE ASSOCIATION AND INDUSTRY-WIDE DEIA PRINCIPLES)

**PM 4.1:** Increase in the Association's budget capacity to pursue DEIA initiatives

**PM 4.2:** Increase in the level of diversity within the Association in leadership positions, committee membership, etc.)

**PM 4.3:** Greater awareness of the level of diversity within member agencies (including leadership positions, member boards, etc.)

**PM 4.4:** Incorporation of DEIA principles in policy positions and advocacy efforts



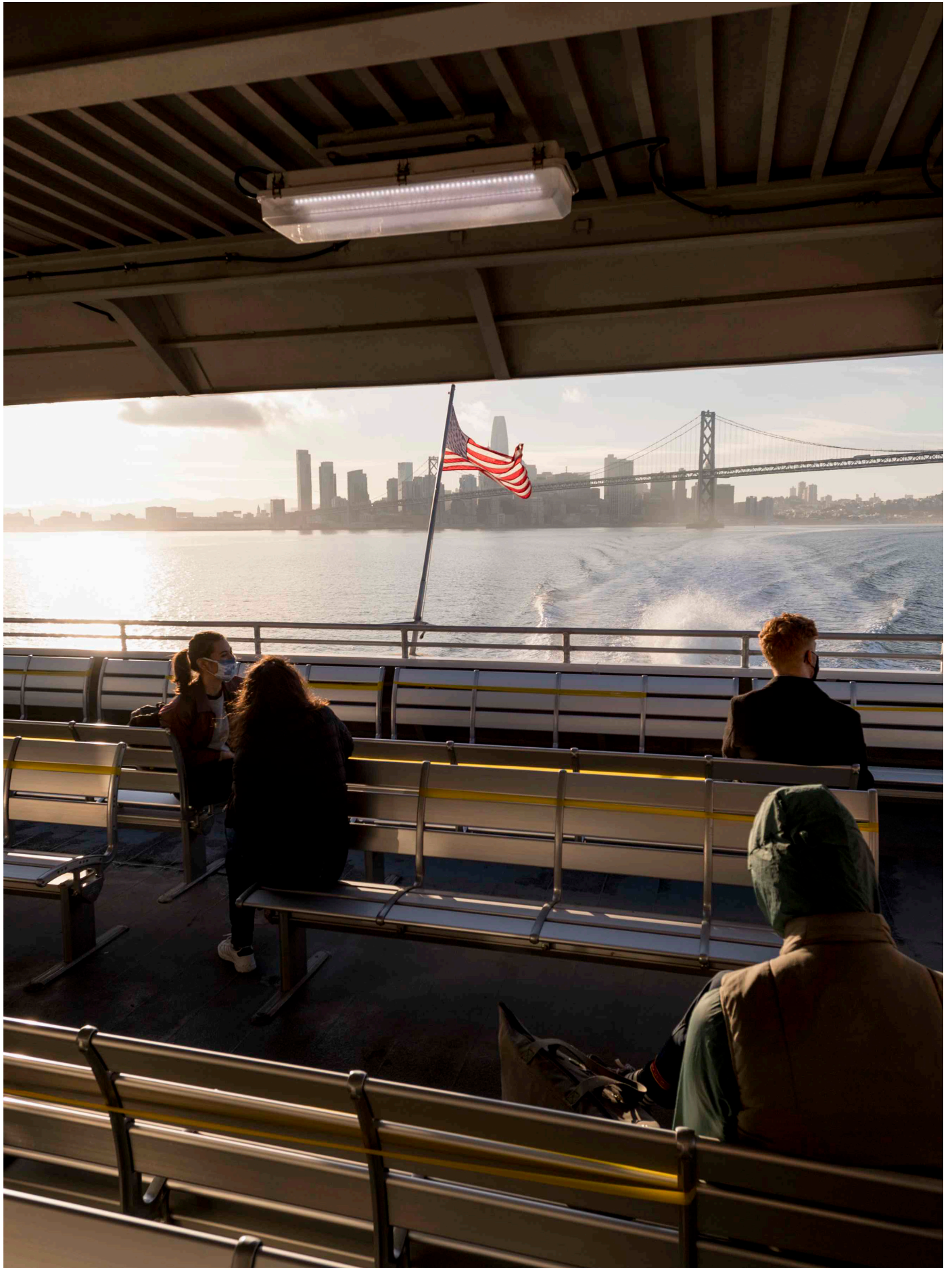




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# Appendix: Sample Staff Workplan Template for Tracking Strategic Plan Implementation







## EXAMPLE WORKPLAN TEMPLATE

For each of the objectives under each of the four goals, Association staff will prepare workplans using the format shown below or something similar.

### GOAL 1: ADVOCACY

#### Objective: 1.1

Influence state and federal decision makers to enact policies and funding solutions supporting, expanding, developing, and advancing public transit.

ACTIONS/TACTICS		TIMELINE			LEAD	SUPPORT	RESOURCES ALLOCATED
		Short 0-2 yrs	Med 2-5 yrs	Long 5+ yrs			
1.1a	Leseritaque velenecus, explabor antiunt quiatur alibusdam quia						
1.1b	Etur adipsundi tem quiam eiciur, quod molum hiligna tiatis nosaerchicia						
1.1c	Sed minvel incias dipsani hilisci liquam, etur adipsundi tem						
1.1d	Expersp erupta num quas estore excestrum suntem quate lanis ex enet						



