

WIPTA Strategic Plan Objectives & Goals

	WHAT?	WHO?	HOW?	WHEN?	ACCOUNTABILITY	NOTES:
A	OBJECTIVE #1	Legislative - Sustain public transportation and meet changing needs.				
	Director: Hubbard, Wilson, Zelenkova					
1.	Maintain long term and stable state funding for transit operating purposes. Aim for reasonable increases and funding expansion.		HWZ with support from WIPTA		Biennially during Wisconsin budget process	Updates provided at WIPTA board meetings
2.	Secure increased capital funding resources through the state and/or federal government.		HWZ with support from WIPTA		Biennially during Wisconsin budget process	Updates provided at WIPTA board meetings
3.	Secure statewide Local Transportation (LTO) enabling legislation.		HWZ with support from WIPTA		Biennially during Wisconsin budget process	Updates provided at WIPTA board meetings
4.	Review and implement virtual opportunities for WIPTA membership interaction with elected officials.	Explore what types of virtual opportunities for engagement might be available for WIPTA members to engage with elected officials with HWZ. This is largely dependent on what is available via elected officials.	HWZ with support from WIPTA		January/February of each biennial legislative session	Updates provided at WIPTA board meetings
5.	Develop way for WIPTA members to more consistently interact with their state of Wisconsin elected officials.	WIPTA leadership with Impact AMC should explore when and for what Calls to Action (CTAs) can be used by all WIPTA members for interacting with their state of Wisconsin elected officials. To be considered: - introducing new transit directors/managers to elected officials	WIPTA Board of Directors and Impact AMC AMs	Review the year over year opportunities for elected official outreach. Determine what/when a CTA should be used to drive outreach to elected officials. Budget process and what members can do is a high priority. Impact AMC can develop a form email that can be utilized by new directors/managers to initiate introduction to state elected officials.	January/February of each biennial legislative session December 31, 2022 for development of introductory content for new directors/managers	Updates provided at WIPTA board meetings
B	OBJECTIVE #2	Membership - Have every transit system in the state of Wisconsin as a member of WIPTA and create and maintain meaningful partnerships with other organizations and associations who stand behind the WIPTA mission.				
	Director:					

<p>1. Develop a membership recruitment campaign.</p>	<p>a) Create membership recruitment materials that can be easily shared with potential members and shared on the WIPTA website.</p>	<p>Impact AMC AMs</p>	<p>Review current membership benefits and Join Us marketing materials and update with current information.</p> <p>Consider a peer-to-peer sharing webpage on the WIPTA website that would allow WIPTA members to easily share benefits and materials with potential members. Create if agreed upon.</p> <p>Market membership recruitment materials to current WIPTA members, so they're aware of where they're located and how to share.</p> <p>Initial focus should be on small, rural systems where turnover occurs and who may not be aware of benefits or how to utilize.</p>	<p>February 28, 2022</p>	<p>Updates provided at WIPTA board meetings</p>
	<p>b) Update potential membership list annually.</p>	<p>Impact AMC AMs</p>	<p>Review current members list compared to all transit systems statewide.</p>	<p>October 15, 2022; annually thereafter</p>	<p>Updates provided at WIPTA board meetings</p>
	<p>c) Determine if a first-time member discount will be provided</p>	<p>WIPTA Board of Directors</p>		<p>November 1, 2022; annually thereafter</p>	<p>Discussion at a WIPTA board meeting</p>
	<p>d) Execute potential membership campaign outreach.</p>	<p>WIPTA Board of Directors and Impact AMC AMs</p>	<p>Impact AMC AMs will provide membership recruitment materials to potential members either via email or mail.</p> <p>Impact AMC AMs will provide a list of potential members to the WIPTA board of directors for personal outreach.</p> <p>Efforts will be tracked and evaluated on an annual basis.</p>	<p>November 15, 2022; annually thereafter</p>	<p>Updates provided at WIPTA board meetings</p>
<p>2. Determine best way for member-to-member communication and execute.</p>	<p>Currently, a large WIPTA member benefit is the ability to communicate directly with other WIPTA members to receive answers on questions that transit systems may have. These member communications are done via email right now.</p> <p>A current challenge to this is that WIPTA members go to a previous email and Reply All to that email in order to capture the email addresses of WIPTA members. These emails may no longer be accurate or new WIPTA members/individuals may not be captured in these old emails.</p> <p>A solution needs to be found that allows WIPTA members to communicate with all current WIPTA members/individuals in an easy to use way.</p>	<p>WIPTA Board of Directors and Impact AMC AMs</p>	<p>This goal will require multiple steps, including, but not limited to:</p> <ul style="list-style-type: none"> - surveying the WIPTA membership to determine if they would prefer for these communications to remain in email, but via a listserv (one email address for all WIPTA members of a certain subset) or if these communications should be moved to a forum function of Wild Apricot. - depending on WIPTA member desires, creating a listserv or populating the forums of Wild Apricot - if listserv: creating one-pager directories that have all WIPTA members for a certain subset (i.e. operations, maintenance, technical assistance, etc.), but also providing the listserv email that would email all individuals in that subset. Impact AMC AMs would be charged with keeping the emails associated with each listserv updated and accurate. This would allow WIPTA members to have 1 email address to email their questions to instead of multiple. An education campaign for WIPTA members would need to be executed on to inform them of this change and to ensure they use the 1 email address vs. the many. - if forums: create the forums on Wild Apricot based on the needed subsets for WIPTA members. An education and training campaign would need to be executed on, so that WIPTA members know how to use the forum. - for either option, copy should be created that can be included in the new member/individual welcome packet, so they're aware of how to communicate their questions to the WIPTA membership. 	<p>February 28, 2022 for survey completion</p> <p>June 30, 2022 for execution, depending on decision</p>	<p>Updates provided at WIPTA board meetings</p>

3.	Continue to cultivate a welcoming environment for new members or new people to WIPTA.	a) Create a welcome packet that can be shared with new members or new people in positions at transit systems that are already WIPTA members.	Impact AMC AMs	Review what might already exist that can be shared with new members or new people. Create a packet that includes: - welcome letter from the President - relevant contact information - schedule of upcoming events - any relevant action items (ex. create their Wild Apricot profile) - renewal expectations - how they can get involved - WIPTA glossary (Derek has this!) - mentor information (see c) below)	March 31, 2022	Updates provided at WIPTA board meetings
		b) Develop process to introduce any new members to the larger membership via the WIPTA emails.	Impact AMC AMs	Create template copy that can be used in emails by the Impact AMC AM to the listserv. Ensure process includes: - internal updates made to any listserv one-pagers - email addresses changes/updated on the listserv	April 30, 2022	Updates provided at WIPTA board meetings
		c) Develop and implement mentorship program for new WIPTA members or new people to WIPTA.	WIPTA Board of Directors and Impact AMC AMs	Identify which WIPTA members are interested in serving as a mentor for new individuals to WIPTA. Determine best way to track this. Impact AMC will develop a Mentor one-pager that can be shared with mentors before they start to work with the new individual. Included in the one-pager would be: - by when outreach should be made to the individual - suggested copy to include in emails or a script for an initial phone call - any upcoming dates/events they should follow-up with the individual on - an overview of how to become more involved in WIPTA Impact AMC AMs will provide the mentor contact information to new individuals to WIPTA and will email both parties to set up the mentorship partnership.	April 30, 2023	Updates provided at WIPTA board meetings
4.	Build and strengthen the relationship with WIPTA coalition partners.	a) Annually, review the current and possible WIPTA coalition partners. Determine what partnership(s) will be focused on for the year - no more than 2 per year should be focused on for improvement.	WIPTA board of directors, HWZ (?)	Review current associations/groups that could be a complementary partner in advancing the WIPTA mission. List of partners as of 2021: - League of Wisconsin Municipalities - Wisconsin Counties Association - Local Government Institute of Wisconsin - Transportation Development Association	January 31, 2022, annually thereafter	Discussion at a WIPTA board meeting

b) Annually (or biennially), execute on partnership outreach/establishment.	WIPTA Chair, WIPTA Vice Chair and HWZ	Outreach should be made for a meeting between the WIPTA Chair, WIPTA Vice Chair, and HWZ representation and the leader of the potential partner.	February 28, 2022, annually thereafter	Updates provided at WIPTA board meetings
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The goal of this meeting should be to establish what joint goals the two organizations may have heading into the next year (or biennium). The two organizations should establish how they'll communicate over the next year (or biennium) and frequency. A suggested goal for this would be an annual meeting to evaluate the previous year and set new goals.

5. Vendor/Associate Partner Outreach	Annually, survey the WIPTA vendor/associate partners to evaluate how they feel about their current partnership with WIPTA and how WIPTA could improve the partnership. Discuss and execute on any suggested changes or updates made via the surveys.	Impact AMC AMs and WIPTA board of directors	Impact AMC AMs will create a survey that will be shared with the WIPTA board of directors for approval. Once approved, Impact AMC will survey the vendor and associate partners on the timeline prescribed by the WIPTA board. Survey results will be shared for discussion at WIPTA board meeting. Any action items as a result of this discussion will be executed on. Impact AMC will ensure this annual process is included in Impact's project management tool.	November 30, 2022 for initial survey February 28, 2023 for any discussion of survey results to be completed by WIPTA board November annually thereafter for survey initiation	Discussion at a WIPTA board meeting Note from Tom Wagener: most of involvement has been and perhaps should be related directly to the conference.
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C OBJECTIVE #3 Meetings/Programming/Resources
Director:

1. Develop and execute on a WIPTA membership website education campaign.	Currently, the WIPTA website is underused by the WIPTA membership. Determine the best way to educate the membership on the uses of the WIPTA website and execute. This information should be updated and shared with the WIPTA membership regularly, helping to drive members to the website, where resources will exist.	Impact AMC AMs	Ensure information on the member-only section of the website is accurate and timely. Discussion has been had at providing a website update and tutorial at the annual WIPTA conference. This would allow content to be provided to all WIPTA members and any updates can be shown to the full membership. Impact AMC staff could also be on-hand at the annual conference to answer any technical questions from members and to provide any hands-on tutorials/training.	September 30, 2022 for initial decision on execution October 2022 for initial execution October annually thereafter	Discussion and updates provided at WIPTA board meetings
2. Develop plug-and-play marketing materials that can be made available to WIPTA members.	Create and provide generic marketing materials that can be utilized by WIPTA members with little to no effort on the part of the WIPTA member.	Impact AMC AMs	Determine what types of materials would be most immediately beneficial to the WIPTA membership. Create and share with the membership, including any instructions for how to update the materials if needed.	March 31, 2024	Updates provided at WIPTA board meetings

<p>3. Develop Roundtable Discussions for WIPTA members.</p>	<p>Currently, a need for additional information or discussion can come out of the email conversations between WIPTA members.</p> <p>WIPTA should provide a way to easily move these conversations into roundtable discussions that are marketed to the WIPTA membership as way to have further discussion and disseminate information amongst members outside of email. If needed, speakers could be sourced to speak to WIPTA members on rising issues or as a way to provide additional information to the members.</p>	<p>WIPTA board of directors and Impact AMC AMs</p>	<p>For determining what should be roundtable discussion topics, members should either be polled regularly or topics should be pulled directly from member communications. WIPTA members could also share directly with the board/Impact AMC on topics they would like further discussion on.</p> <p>Roundtable discussions should happen as needed, but a goal should be to have about 3 of these discussions per year.</p> <p>These discussions should also have someone taking notes/minutes, which can then be shared via the WIPTA newsletter for individuals who were not able to attend.</p> <p>Another discussion point would be if these discussions are recorded to allow for future access by WIPTA members.</p> <p>Example of roundtable discussion (and possible first topic) that would be beneficial to WIPTA members would be bringing electric buses to a transit system. For this discussion, WIPTA members who have successfully brought electric buses into their system could prepare a short presentation on what they did/what members should know and also be prepared for a Q&A from other WIPTA members.</p> <p>Execution:</p> <ul style="list-style-type: none"> - determine best way to source roundtable discussion - inform membership as to how they can suggest roundtable discussions - determine marketing schedule (should provide at least 1 month for members to be made aware of and be able to attend) - determine recording and/or notetaking responsibilities, as well as process for providing information to all WIPTA members after the discussion <p>This is a benefit that should be updated and delineated on any WIPTA member benefits - "Roundtable discussions on emerging</p>	<p>April 30, 2022 for arranging logistics for first roundtable discussion</p>	<p>Updates provided at WIPTA board meetings</p>	<p>Next opportunity is the next development of a State Contract Heavy Duty bus procurement.</p>
<p>4. Provide WIPTA-sponsored training to WIPTA members</p>	<p>In the past, WIPTA has provided training to WIPTA members from NTI or Transit Mutual.</p> <p>The goal would be to provide training to WIPTA members, including Transit Manager training and Safety Officer training. WIPTA would work to cover the cost of the training</p>	<p>WIPTA board of director and Impact AMC AMs</p>	<p>To accomplish:</p> <ul style="list-style-type: none"> - decision made by WIPTA board of directors as to when trainings will take place. Ensure that decision is made by a time that would allow any costs to be included in WIPTA budget - arrange for location and timing - market to members - provide evaluation after the fact to members on how often they would like training provided (WIPTA board feels every 3 years would be sufficient) - repeat above for next training (Impact AMC will have training details in project management tool) 	<p>August 30, 2022 for initial decision</p> <p>2023 for execution of first training</p>	<p>Updates provided at WIPTA board meetings</p>	

5.	Build a searchable document library on WIPTA's members-only website accessible to WIPTA members.	<p>WIPTA members are often looking for resources from other WIPTA members via their member-to-member communications.</p> <p>The goal would be to house these commonly asked for documents on the members-only section of the WIPTA website. This would allow WIPTA members to first search for items they may ask of other WIPTA members before asking WIPTA members for resources.</p>	Impact AMC AMs	<p>To execute:</p> <ul style="list-style-type: none"> - collect resources from previous email communications. This could be done by Impact AMC reviewing email communications from the last 1-2 years and collecting any attachments or resources that have been shared. - organize resources online in a way that allows them to be searchable by members - ensure that Impact AMC AMs are on any and all email communications among members to collect and keep updated any new resources. - some outreach to members for resources could be done proactively by Impact AMC in direction is provided on what types of resources WIPTA members would like to see on the website. 	<p>January 31, 2023 - determine best way to organize resources on the WIPTA website</p> <p>June 30, 2023 - initial materials and resources have been collected</p> <p>December 31, 2023 - website page is made public and marketed</p>	Updates provided at WIPTA board meetings	Could include information currently regularly generated also, ridership reports, fares, union contracts. These are regularly requested by members
6.	Determine if board meetings and all-member meetings should be separated.	<p>Based on Impact AMC experience, membership association board meetings are held separate from all-member meetings. This allows the board to discuss strategic items and make decisions without bogging down the general membership with these details and helps to streamline programming for members to be more member-focused rather than operations-focused. Membership is still aware of when board meetings occur, because members can attend open session if they'd like.</p> <p>Currently, WIPTA board meetings are open to all WIPTA members and many of them attend. Board meetings have morphed into more of a membership meeting, without the opportunity for strategic thinking and planning for the board.</p> <p>Discussion should be had as to whether WIPTA board meetings should be separate from a more general WIPTA membership meeting that can be held and open to all members to receive WIPTA updates and programming.</p>	WIPTA board of directors	<p>The WIPTA board of directors should discuss the separation of these two meetings to help streamline discussion in each area: board and membership. Impact AMC is able to provide support and answer questions about what this could look like for WIPTA, as well.</p> <p>Execution, if needed.</p>	<p>June 30, 2022 - discussion/decision</p> <p>October 31, 2022 - execution</p>	Updates provided at WIPTA board meetings	Comments from Tom - I like having as many members present as would like to participate. This allows for immediate input on items that effect membership as a whole. Also, for transparency sake, keeping the meetings open to all members is a good idea. Perhaps if we begin some sort of round-tables, the involvement at board meetings will diminish.
D OBJECTIVE #4		Organization/Governance					
Director:							
1.	Update WIPTA's mission.	<p>a) Review current and proposed mission with WIPTA membership. Provide opportunity for feedback from membership.</p> <p>Proposed mission is "Wisconsin Public Transportation Association (WIPTA) will be a strong and cohesive voice advocating for, educating on, and improving public transportation at local, state, and federal levels."</p>	WIPTA board of directors	Determine best avenue to share proposed mission. Options could include: upcoming membership meeting, email update, etc.	November 30, 2021	Update provided at WIPTA board meeting	
		<p>b) Updates made to WIPTA mission, per proposal and any membership changes/updates.</p>	Impact AMC AMs	<p>Review all places that WIPTA's mission resides and make updates. Possible locations could include:</p> <ul style="list-style-type: none"> - website - letterhead - board member job descriptions 	December 31, 2021	Update provided at WIPTA board meeting	

c)	Update WIPTA's "Who We Are." Right now, this is very general. Goal would be to have this section on the WIPTA website include a better representation of who WIPTA is - their membership make-up, rural/urban, etc.	WIPTA board of directors and Impact AMC AMs	Discuss current "Who We Are" and consider what updates should be made. Update the "Who We Are" and share with membership for feedback and updates. Execute on changes.	January 31, 2022	Discussion at WIPTA board meeting
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2.	Create an annual plan of work for WIPTA.	With the WIPTA board of directors, create an annual overview that includes all the recurring work/discussions/decisions that need to happen throughout the year. This should include any contract reviews that are associated with WIPTA services providers.	WIPTA board of directors and Impact AMC AMs	Impact AMC AMs will develop an initial annual plan of work based on what we know about WIPTA's year over year work. This draft plan will include task or discussion, timing, and who "owns" the task. This draft will be shared with the WIPTA board of directors for review and for any changes/additions to be made. When the draft is finalized, Impact AMC will share the final plan with the WIPTA board of directors and will add an annual review of the plan to their project management tool to ensure the plan is reviewed with each new board of directors, as well as annually to ensure that all work is completed for the year. Each part of the plan will also be added to Impact's project management tool with appropriate reminder deadlines, so Impact can proactively help the WIPTA board of directors stay on target with what needs to be accomplished.	November 15, 2021	Discussion had at WIPTA board meeting
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3.	WIPTA board of directors will make final decision on Executive Director role.	WIPTA would like to have a part-time Executive Director-type role that would allow someone separate from the members of the board and the Chair of WIPTA to be the "face of WIPTA." This role would allow WIPTA to have someone separate from the board available to testify on legislation that impacts WIPTA members.	WIPTA Executive Committee	The WIPTA executive committee will create a job description for the position. The WIPTA executive committee will review costs/budget as well as what options might be available to their organization. A proposal will be presented to the WIPTA membership by the WIPTA executive committee at their 2022 annual meeting.	October 1, 2022	Discussion at WIPTA board meetings
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