



# STRATEGIC PLAN

# REPORT CARD

JULY 2023



MEMBER  
SERVICES

# GOALS

## Develop strategies to deepen the Association's relationships and increase engagement with members to strengthen the Association's activities in anticipating and meeting member and industry needs

### **ACTION**

**Schedule monthly webinars on key topics (half sponsored, half not); make sure we are communicating those in a timely manner**

**METRIC** Once a month.

**IMPLEMENTATION** The membership team will continue to manage the Corporate Partner relationships to secure sponsored webinars and to seek out content and speakers for the non-sponsored webinars.

**UPDATE** We have hit this target using a mix of sponsored and non-sponsored members-only webinars to establish regular communications with members on key topics and to raise communications revenue. We regularly are hitting more than 100 registrants for these webinars. We intend to continue these efforts and are looking to plan a small systems Board training two-day webinar event in the summer after EXPO and before SUN.

### **ACTION**

**Develop new member focus group**

**METRIC** Meet once a quarter with all new members from the most previous quarter.

**IMPLEMENTATION** The team will develop a marketing plan for the new members and invite them to the focus group (s). First new member focus group to be held in late September as a push for EXPO 2023.

**UPDATE** We plan on implementing the first of these focus group webinars in the fall of 2023. Plans are underway to hit this target.

<p><b>ACTION</b></p> <p><b>Create active working groups or councils within each membership category</b></p>	<p><b>METRIC</b> Quarterly meetings among these newly established councils, which will replace the outdated state and tribal delegate council.</p> <hr/> <p><b>IMPLEMENTATION</b> We developed a state and tribal delegate council transition plan, shared it with the Board and will council and schedule virtual meetings.</p> <hr/> <p><b>UPDATE</b> We first discussed this concept with the CTAA Board of Directors in October 2022 and followed through with an implementation plan that was accepted by the Board in March 2023. We are planning on announcing the transition at the CTAA EXPO 2023 and beginning the webinars in the fall of 2023.</p>
<p><b>ACTION</b></p> <p><b>Increase CTAA membership by requiring in-place membership to register for EXPO and other vital CTAA resources</b></p>	<p><b>METRIC</b> For EXPO registration, monthly webinar registration, SUN Conference registration and more, require an active CTAA membership number as part of on-line registration process.</p> <hr/> <p><b>IMPLEMENTATION</b> We implemented this in November of 2021 when we launched registration for the EXPO 2022 in Louisville. All key association activities since then have required an active CTAA membership number.</p> <hr/> <p><b>UPDATE</b> We have continued to successfully implement this policy as registration grows for EXPO 2023. We expect to reach record levels of CTAA membership by the close of EXPO 2023, ideally reaching 1,300 for the first time in Association history. Loreal's stewardship and carrying through this action item has proven spot on.</p>
<p><b>ACTION</b></p> <p><b>Re-develop CTAA's members-only website to offer enhanced member engagement, member networking and mirror our membership categories</b></p>	<p><b>METRIC</b> Development, testing and launch of the new members-only website will be completed in 2023.</p> <hr/> <p><b>IMPLEMENTATION</b> In late 2022, the communications team finalized the desired functionality of the new members-only website and began working directly with CTAA's web manager and our prime contractor on finalizing the new site and prepare it for the testing phase.</p> <hr/> <p><b>UPDATE</b> We have decided to develop the member-to-member networking and engagement piece of the new site to mirror the operating groups around which we're transitioning the state and tribal delegate council. The new site launched August 2023.</p>

# Increase and broaden Association membership through resource development, advocacy and communications, reaching the most diverse and large-scale complementary partners in communities across the nation by continually seeking the most effective ways to communicate with and engage members

**ACTION**

**Increase in-depth research and reports on key topics**

**METRIC** 2-3 times a year. The membership committee would decide on the topics, topics to include: driver shortages, crisis management, commute patterns etc.

**IMPLEMENTATION** Membership will ensure that this new activity is on the agenda during membership committee meetings and that vital topics will be shared with the full CTAA staff at all-in and manager’s meetings.

**UPDATE** We have used the process to develop key resources for members like the COVID-19 resources pages and vendor pages; an on-line buyers guide featuring CTAA’s vendor members; the transit and vaccination white paper; the new toolkit on crime and human trafficking prevention for smaller transit operations; the updated salary and benefits survey and more.

**ACTION**

**Promote CTAA in front of a national audience – news outlets**

**METRIC** Twice a year inclusion in an article or news pundit opportunities.

**IMPLEMENTATION** Communications will continue to ensure that we are the go to association in the industry. She will continue to vet all opportunities to ensure that they align with CTAA’s goals and objectives.

**UPDATE** Far more than twice annually, CTAA has been included and featured in news outlet stories on issues like small bus availability, key rural transit issues, NEMT and ridesharing and more. CTAA also has been featured in a number of transit-related podcasts as part of this effort.



<p><b>ACTION</b></p> <p><b>Curate a Hill Day that is inclusive of all levels of CTAA leadership (ELA, delegate, board)</b></p>	<p><b>METRIC</b> Once a year develop a ‘conference styled’ event across all levels of CTAA leadership to develop and strengthen Congressional relationships. We will capture Hill Day ‘events’, promote, and discuss via post event reporting to members and webinar on what was discussed.</p> <hr/> <p><b>IMPLEMENTATION</b> The team will work on a plan for our first in person Hill Day in two years (Spring 2023). Will start small with ELA in 2023 and grow the event from there while being cautious about the budget implications. As the event grows over the years and we continue to assess EXPOs, this could be an opportunity for sponsorships etc.</p> <hr/> <p><b>UPDATE</b> <i>The Hill Day we concluded on March 9 and met all of the actions we committed to as part of this action item. Collectively, CTAA Board, staff and ELA members participated in 58 congressional office and committee meetings.</i></p>
<p><b>ACTION</b></p> <p><b>Develop a training cross-promotion plan</b></p>	<p><b>METRIC</b> Meet monthly with the training department to further develop and implement a cross promotion plan. The plan will include: enhancing our customer service offerings – develop a website(s) to allow the purchasing of training and membership at the same time; curate a purchasing journey for the typical customer with various offerings.</p> <hr/> <p><b>IMPLEMENTATION</b> Membership will work with select CTAA staff on the technological and content pieces. Communications will assist on the marketing of new and improved purchasing journeys.</p> <hr/> <p><b>UPDATE</b> <i>The training and membership departments are indeed meeting almost daily. This action item initially led to a joint training-membership data management position at CTAA, which is currently being revisited as we hire a new staff member to serve in this capacity. Beyond data management we are beginning discussions internally on improving co-marketing of training and membership.</i></p>
<p><b>ACTION</b></p> <p><b>Develop a Technical Assistance cross-promotion plan</b></p>	<p><b>METRIC</b> Develop a new TA website and create pointed efforts for TA resource distribution to CTAA membership. Updates to be performed regularly and will result in a better understanding for CTAA members of the value of the Association’s TA efforts.</p> <hr/> <p><b>IMPLEMENTATION</b> Regular communications features – website content, blogs, social media posts, informational sessions and e-newsletter articles – that highlight key outcomes, resources and takeaways from CTAA’s grant-funded TA projects.</p> <hr/> <p><b>UPDATE</b> <i>Through NCMM, we hired a communications staff member in late 2022 to coordinate this effort. A full plan for this effort will be worked up after EXPO 2023.</i></p>

# Deepen the Association's reach to staff within our member organizations by supporting them through leadership development and providing resources at all levels

**ACTION**

**Develop a digital sign up form for member staff**

**METRIC** Once monthly include sign up form in the member newsletter which is typically sent to General Managers/Executive Director.

**IMPLEMENTATION** Membership and Communications to start this process immediately.

**UPDATE** This initial sign up form was distributed in 2022 and our database enhanced to include multiple positions at a single member agency. We intend to continue these efforts and are looking to plan a small systems Board training two-day webinar event in the summer after EXPO and before SUN – thus adding Board members to our database. Additionally, we are removing the barrier of needing a unique login for our members only site, thus allowing all staff within member organizations to easily access CTAA resources with just their member number.

**ACTION**

**Create member-only promotions for training discounts and new training opportunities**

**METRIC** Quarterly, promote special training promotions and new training opportunities supporting all levels of the organization to CTAA members (drivers, support staff, board, CEO level).

**IMPLEMENTATION** Membership has worked directly with Caryn to implement this action. The ultimate goal is to increase CTAA training and certification participation by members – particularly transit agency members.

**UPDATE** Since early 2022, these emails have been flowing with periodic tweaks engineered by management.

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**ACTION**

**Consider the creation of organizational level or membership demographic based events (rural only, NEMT only, CEO summit, Corporate Partners, etc.)**

**METRIC** Develop a focus group for each considered demographic to see if they would be interested in attending such events. The focus groups are hard-wired into the transition of the state and tribal delegate council into the new member category operating groups.

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**IMPLEMENTATION** In addition to the ongoing successful SUN conferences, we tested the implementation of a rural transit meeting at EXPO 2022 in Louisville.

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**UPDATE** *We are further testing this action item with separate rural and small urban CEO meetings scheduled in Oklahoma City at EXPO 2023. Once the quarterly member category meetings commence later this year, these conferences will be an agenda item.*



# Increase engagement, resources, and communications to tribal, NEMT, and corporate partner members in efforts to be more consistent across all membership demographics

## **ACTION**

**Identify and clarify CTAA's position in the NEMT space. Develop a thought leader in the NEMT space to assist with the creation and development of new training and general content designated to this membership category**

**METRIC 1** Use the membership committee and board at-large to discuss how NEMT fits into the overall branding of CTAA (who we are, what we were, and where we are going).

**METRIC 2** Seek out a thought leader in the NEMT space to guide CTAA in the creation of new training, content, and solicitation of new members.

**IMPLEMENTATION** Once we've developed a thought leader and CTAA-NEMT branding direction, implement membership benefits, resources and advocacy efforts to support CTAA's NEMT members.

**UPDATE** *We have not yet embarked on this important action item. We have developed some key contacts through MTAC and our membership that might be valuable as thought leaders. We continue to develop good and useful NEMT training sessions for EXPO. We continue to have an active role in NEMT advocacy efforts. We just haven't yet brought all of these together into a cohesive plan as is outlined in this action item.*

**ACTION**

**Give tribal delegates a dedicated leadership role in creating content and resources for our tribal members**

**METRIC** Meet with tribal delegates quarterly to discuss our tribal member’s needs as they relate to conference workshop content. Additionally, reach out to previous tribal conference attendees to determine what they liked and disliked about previous meetings.

**IMPLEMENTATION** Work began on this action item with the acceptance of the strategic plan.

**UPDATE** *The membership and communication team has actively reached out to the tribal transit community. CTAA staff have attended many tribal transit meetings at the state, regional and national level in the past two years – both virtually and in-person. We have developed an enhanced presence for tribes at the 2023 EXPO through both general conference speakers and FTA holding its first national tribal transit symposium at the 2023 EXPO. Further, we developed specific tribal-related resources through the FTA-funded Crime and Human Trafficking prevention grant and helped plan and lead an FTA webinar on the issue. We added a number of tribal-focused priorities to our 2023 Legislative and Policy priorities. Thus far, these efforts have not resulted in significant, additional tribal membership for CTAA.*

**ACTION**

**Increase the number of memberships in this space and increase engagement beyond the financial transaction. Identify the future of Corporate Partners at CTAA events (in person and virtual)**

**METRIC** Meet with a small rotating group of Corporate Partners quarterly to better identify their membership needs: legislatively, resources, membership benefits, newsletters, content creation, events, advertising opportunities.

**IMPLEMENTATION** Start working on this immediately, and will aid in generating support for the EXPO.

**UPDATE** *We have seized on the small bus crisis as a direct way to jump start our efforts on this action item, meeting with bus manufacturers, OEMs, bus dealers and more. Our goal has been for these important Corporate Partners to view us as partners by sharing information and involving them, strategically, in the Association’s efforts to manage the small bus crisis.*



# FISCAL RESPONSIBILITY GOALS

# Develop and Implement Strategies to Ensure the Association's Long-Term Fiscal Stability and Sustainability

<p><b>ACTION</b> <i>Coordinate with emerging needs effort occurring internally</i></p>	<ul style="list-style-type: none"> <li>• Using guidelines</li> <li>• Support or eliminate projects recommended for the Association</li> </ul>
<p><b>ACTION</b> <i>Conclude independent audits with zero findings and continue to update and strengthen fiscal policies and procedures</i></p>	<ul style="list-style-type: none"> <li>• Update and train on effective federal funding compliance measures and efforts</li> <li>• Update and train on effective internal control measures</li> <li>• Revise, as needed, CTAA Financial Policies and Procedures manual to ensure the Association's compliance and internal control measures are current and clearly communicated to all staff</li> </ul>
<p><b>ACTION</b> <i>Establish guidelines for Federal and non-Federal funded opportunities</i></p>	<ul style="list-style-type: none"> <li>• Define extent of Mission Creep Acceptability through vetting of staff; Finance Committee</li> <li>• Federal – canvas non-traditional federal partners; strengthen existing federal partners</li> <li>• Non-Federal – consider expansion beyond transportation partners; strengthen existing Toyota partnership</li> <li>• Identify preferred balance of activity federal/non-federal guided by sustainability and financial stability</li> </ul>

<p><b>ACTION</b></p> <p><b>Determine Minimum Acceptable Return on Projects</b></p>	<ul style="list-style-type: none"> <li>• Include indirect cost recovery on non-government preferred contrasted to expected</li> <li>• Assess balance of funders who contribute to the bottom line contrasted to support the organizational infrastructure</li> </ul>
<p><b>ACTION</b></p> <p><b>Develop guidelines on Risk Acceptance and Aversion</b></p>	<ul style="list-style-type: none"> <li>• Risk/reward tolerance</li> <li>• Establish areas of non-pursuit</li> </ul>

**TARGETS**

**Zero-finding Audit** – The FY21 and FY22 audits concluded with zero findings

**Opportunity Guidelines** – FY22 focus on federal; FY23 focus on non-federal; see procedures being developed by the Board Grants Committee

**Project Return** – FY22 internal development; Finance Committee vetting; balance

**Risk Tolerance** – FY22 initial draft w/internal consensus

**UPDATE** Internally, effective dialogue and cooperation is ongoing between finance staff and project managers to ensure that all new projects (whether federally funded or not) are properly vetted, pursued and on-boarded in a systematic approach and in-concert with our Financial Policies and Procedures. The recent creation of the Board Grants Committee and the defining of its role and procedures will further this necessary process and solidify guidelines for our pursuit of funding opportunities. In 2022, we won the re-bid from HHS for the National Transit Accessibility Center (NTAC) which we are currently standing up. Through regular communication, we have broadened our Toyota program. We have not, yet, developed a minimum acceptable return on projects, though Rex and Finance Team have, since the adoption and acceptance of the Strategic Plan, developed and executed indirect cost recovery strategies that have resulted in a more predictable rate and in no findings in the past two independent audits. The promotion of Lena Kyle into the Ethics and Compliance Officer (ECO) position, and with her emphasized role in developing consistent procedures and processes in risk management and tolerance, speaks directly to the third action item under this goal.

# Ensure Adequate Staffing Levels for Anticipated Growth in Programs – Analyze and Fulfill staffing needs in relation to Anticipated Growth in Programs

<p><b>ACTION</b> <i>Highlight Staffing Component in each budgeted Revenue Center</i></p>	<ul style="list-style-type: none"> <li>• FY22 budget levels reviewed and publicized</li> <li>• Produce guidance on positions per \$X of revenue for internal consideration</li> </ul>
<p><b>ACTION</b> <i>Introduce a means to review ongoing Administrative Support with revenue fluctuations</i></p>	<ul style="list-style-type: none"> <li>• Quantify higher effort of administrative support seemingly required on government side</li> <li>• Identify current pockets of non-compliance desired to be back filled</li> <li>• Canvas non-traditional means of support available in lieu of staffing enhancements</li> </ul>
<p><b>ACTION</b> <i>Confer internally to arrive at an acceptable growth factor target for each fiscal year; confirm with appropriate Board Committee(s)</i></p>	<ul style="list-style-type: none"> <li>• Track last five years trends to serve as benchmark</li> <li>• Establish ultimate goal for FY25 and work back</li> </ul>

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**ACTION**

**Introduce staffing assessment process annually and as part of each new business opportunities**

- Review desired staff/consultant mix by revenue center
  - Identify needs contrasted to resources available; if not balanced reject the opportunity
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**TARGETS**

**Staffing Components (a)** – FY22 and ongoing

**Baseline Support (b)** – FY23 and ongoing

**Growth Factor Targets (c)** – FY22; ongoing as part of budgeting process

**Staffing Assessments (d)** – FY22 and ongoing

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**UPDATE** CTAA has grown the staff slightly since the adoption of the Strategic Plan. The Training and Certification department's growth demanded an additional position in 2022, and we have added to our T/A team staff in the first quarter of 2023. In each of these cases, the Finance Team has been directly consulted and involved to ensure proper staffing and adherence with the fiscal year's operating budget. In our initial internal budgeting while the full operating budget for the fiscal year is being developed, the staffing component (which is the single largest expense in each business center) is focused on and finalized first. We have not yet developed a position /\$ of revenue analysis for the Association – but will focus on that later this year or into 2024.

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## Develop and Adopt an Investment Strategy for Reserving Funds to Meet CTAA needs

<p><b>ACTION</b> <i>Determine point of Debt Freedom</i></p>	<ul style="list-style-type: none"> <li>Using Long Term Debt Analysis in conjunction with the Fund Balances at the conclusion; define debt free target</li> </ul>
<p><b>ACTION</b> <i>Define acceptable level of Investment Risk</i></p>	<ul style="list-style-type: none"> <li>Consult with Finance Committee; bankers and other stakeholders to consider appropriate risk levels in anticipation of growth</li> <li>Consult with Investment professionals on how best to attain the desired risk tolerance</li> </ul>
<p><b>ACTION</b> <i>Craft/Draft Investment Policy six months prior to being out of debt</i></p>	<ul style="list-style-type: none"> <li>Review Policy Draft with Senior Management, make adjustments based on input received</li> <li>Over a series of Finance Committee meetings, formulate an Investment Policy for adoption by the Board</li> </ul>
<p><b>ACTION</b> <i>Define desired reserves</i></p>	<ul style="list-style-type: none"> <li>Include role of the reserves</li> <li>Include base line minimum reserves</li> <li>Include use of options to reserve levels</li> </ul>



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## TARGETS

**Freedom from Debt (a)** – FY23

**Investment Risk Tolerance (b)** – FY23 and ongoing

**Initial Investment Policy (c)** – FY23; ongoing as part of budgeting process

**Establishment and use of Reserves (d)** – FY23 and ongoing

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**UPDATE** *We have successfully retired all CTAA long-term debt. We have collected strategies and policies from partner organizations that will serve as useful investment policy models for CTAA. We expect, with the development of the operating budget for FY24, an initial look at the development of a reserve policy to be led by the Board's Finance Committee in conjunction with CTAA staff.*

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TECHNICAL  
ASSISTANCE

GOALS

# Become more proactive in developing forward-thinking technical assistance (TA) content and delivery mechanisms to serve CTAA members

<p><b>ACTION</b></p> <p><i>ID potential areas of focus from what CTAA staff are hearing in the field</i></p>	<ul style="list-style-type: none"> <li>• Assign staff general focus areas to ensure proper attention to relevant areas</li> <li>• Establish a research methodology or framework for staff to follow for periodic research/investigation</li> <li>• Attend cross-sector events to understand relevant challenges or opportunities</li> </ul>
<p><b>ACTION</b></p> <p><i>Be connected to the next challenges and opportunities while they're around the curve</i></p>	<ul style="list-style-type: none"> <li>• Create staff liaisons to relevant sector and cross-sector leaders/representatives</li> <li>• Dedicate research time for staff to identify emergent needs for periodic all-in meetings</li> </ul>
<p><b>ACTION</b></p> <p><i>Evaluate new ideas and their relation to our field</i></p>	<ul style="list-style-type: none"> <li>• ID strategies that can be addressed through CTAA's existing programs and activities, as they come up</li> <li>• ID strategies that require establishment of new initiatives and programs, as they come up</li> <li>• Evaluate which new ideas aren't appropriate to our work</li> </ul>
<p><b>ACTION</b></p> <p><i>ID ways to move new ideas forward</i></p>	<ul style="list-style-type: none"> <li>• Based on the previous action item, develop relevant resources to deliver information on new ideas to the field, e.g. white paper, direct technical assistance</li> </ul>

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## **METRICS AND TARGETS**

### **1.1 Number of new relationships with individuals or entities that introduce us to upcoming issues. Target = 20**

Individuals/organizations/entities that the TA centers have established relationships with through March 2023:

- ADA Participatory Action Research Consortium (PARC)
- Broome County, NY Office on Aging
- Choctaw Nation of Oklahoma
- Enterprise Community Partners (Housing Non-profit)
- Environmental Protection Agency's Recreation Economy for Rural Communities Program (US EPA and EPR-PC Consulting)
- National Association of Development Organizations
- National Organization of State Offices of Rural Health
- Neighbor Network of Northern Nevada
- New Mexico Non Metro Area Agencies on Aging
- Oklahoma City Planning Department
- Paralysis Resource Center (PRC)
- Patients First, a patient advocacy group
- Pierce County (WA) Emergency Management
- Shared Use Mobility Center (SUMC)
- Southern Mississippi Planning & Development District
- State Assistive Technology, Training, Technical Assistance and Internet Site (AT3)
- Statewide mobility management networks in New Hampshire, Ohio, and Connecticut
- The National Park Service Capital Region
- University of Arkansas, Dept. of Agriculture, Cooperative Extension Service
- University of Illinois Chicago, College of Applied Health Sciences

### **1.2 Number of follow-up inquiries from members on ideas we introduce. Target = 5 per year**

- Not yet begun

### **1.3 Number of resources introducing the field to important, emerging, future-focused topics. Target = 2 per year**

- NCATT is creating a tool to help agencies visualize how to balance fixed route and microtransit service deployments

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**UPDATE** *The NCMM team have taken the lead on this and we have yet to apply what they've developed and established with NCMM to the entire Association – sometime in 2023. The NCMM team has attended cross-sector events in issues like housing and emergency response, and is using these cross-sector skills and the understanding of the team's skillsets to lead CTAA in developing a team to respond to the Thriving Communities grant solicitation funded by DOT and HUD.*

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## Enhance capacity and capability of CTAA to deliver technical assistance (published resources; in-person, on-site, in-depth planning; training) to members

<p><b>ACTION</b> <i>Identify core CTAA competencies where we want to have expertise and capacity to deliver TA</i></p>	<ul style="list-style-type: none"> <li>• Through the strategic planning process, build consensus among staff on core CTAA competencies</li> </ul>
<p><b>ACTION</b> <i>Identify gaps in CTAA staff capacity/expertise</i></p>	<ul style="list-style-type: none"> <li>• Identify staff expertise and skills to offer</li> <li>• Determine if gaps are crucial to mission and should be filled internally or via external partners</li> <li>• Have each staff person develop professional growth plan for each year, coordinate plans among staff to avoid duplication</li> </ul>
<p><b>ACTION</b> <i>Close internal knowledge gaps</i></p>	<ul style="list-style-type: none"> <li>• Invest in ongoing staff professional development related to established core CTAA competencies</li> <li>• Hire new staff that fill identified gaps, if unable to be met by current staff</li> </ul>
<p><b>ACTION</b> <i>Establish relationships with external partners for referrals</i></p>	<ul style="list-style-type: none"> <li>• Identify which external relationships already exist</li> <li>• Research potential complimentary partnerships</li> <li>• Actively participate in external partner activities</li> </ul>

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## **METRICS AND TARGETS**

### **2.1 Number of professional development activities related to core CTAA competencies. Target = 2 per person, annually**

- CTAA plans on doing a full staff core competency analysis in late 2023
- Staff attended the NADO Washington Conference to learn about trends in the economic development field and additional opportunities for partnerships with members
- 3 staff members have been learning GTFS and GIS skills to assist members with using these technologies

### **2.2 Number of unique external partner collaborations. Target = collaboration with 10 unique external partners**

- See progress in 1.1, above.

### **2.3 Number of external partner activities (blogs, whitepapers, events, etc.). Target = 20 external partner activities**

- Staff collaborated with the Missouri Rural Health Association for a blog post on Mobility Management Certification
- Staff attended an EPA-funded workshop in Brunswick, MD. This workshop was held in a member community, and allowed CTAA to increase awareness of transit's role in economic development
- Staff are participating in the working group that is developing GTFS-Flex, which will help demand-response transit agencies make their services discoverable on trip planning apps (e.g. Google Maps)

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**UPDATE** *We have yet to do the full-staff core competency analysis, which is a fundamental first step in achieving this goal. We hope that we can start this process in late 2023 which will allow us to better understand internal knowledge gaps; close those gaps with a combination of training and hiring; and begin to establish new organizational partnerships with these competencies in mind.*

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## Leverage work with external customers (federal, non-profit, companies) to deliver expanded technical assistance to the community transportation field

### **ACTION**

**Identify what new ideas or strategies learned from existing TA contracts can be leveraged for TA**

- Gather promising strategies and ideas from staff who have implemented previous TA contracts
- As a group, prioritize strategies and ideas that should be shared with all staff
- Share out information gathered as an agenda item in regular staff meetings
- Create internal catalog (using something similar to NCMM TA survey [google forms?]) of promising strategies and TA from previous contracts

### **ACTION**

**ID other supporting mechanisms for TA (state, fed, other)**

- Create a monthly TA group meeting that includes training/ membership
- At the meeting hear what topics continue to pop up for members
- Discuss which topics rise to the level of CTAA to take additional steps
- Decide what the best course of action is (ie, new TA center, new legislation, etc.)
- Use internal resources (advocacy, political capital, staff time) to seed new TA efforts

### **ACTION**

**ID what customers may be willing to pay for**

- Determine what styles of TA (e.g. online training modules vs. in-person) are most popular for members
- Which topics could be addressed through paid TA
- Determine which strategies can be taught in new CTAA trainings

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## METRICS AND TARGETS

### 3.1 CTAA's success in galvanizing action on new TA issues

**Target: 50% of TA issues CTAA champions see additional action from outside sources (FTA, State, private sector, NGOs, etc.)**

- CTAA staff have begun regular internal meetings to identify new ideas and strategies learned from CTAA's various TA program efforts
- On the small bus crisis, CTAA has engaged with partners at bus manufacturer and bus dealership levels
- On the worker shortage crisis, CTAA has engaged with partners at local, state and national Workforce Development Boards as well as amplifying any innovative processes members have developed that have shown success in increasing driver applications
- CTAA recently hired a staff member (Sage Kashner) whose job description is almost entirely devoted to communicating, promoting, and raising awareness of our TA resources and expertise (both internally and externally). Sage is actively engaged in delivering on the action items in this goal and we expect her efforts to allow us to hit the metrics and targets we identify here

### 3.2 Number of new CTAA trainings with new strategies from TA efforts

**Target: 1 new training a year with new strategies identified in TA efforts**

- CTAA staff have developed a full complement of new workshop offerings for EXPO 2023, and will evaluate the potential of developing a full training from these workshops
- Following a recent conversation with a West Virginia transit provider, CTAA is discussing the possibility of a training that promotes empathy among transit drivers for their passengers
- CTAA is discussing the feasibility of adding a module to its PASS training on procedures in the case of a suspected drug overdose
- Staff developed an on-line course on Exploring Types of Agreements to Guide Partnerships
- Staff have developed an on-demand course on using free GIS tools for analyzing their systems
- Staff have provided training on strategies to enhance and increase involvement and inclusion of older adults and persons with disabilities through the TP4A Program

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**UPDATE** Regular internal meetings (managers, grant teams and all employees) have become mechanisms to identify new ideas and strategies learned from CTAA's various TA program efforts. Further, the development of the curriculum at EXPO, which involves the entire CTAA staff, allows us to take these fresh concepts and begin to build content and involve partners (both individuals and organizations). We have not yet completed this internal catalog – though the list of CTAA projects we put together for Hill Day 2023 is a reasonable start for this effort. The TA team is meeting regularly (not quite monthly, yet). With the progression of these meetings, we will continue to analyze what we're learning and testing in the TA phase and how it can be applied to CTAA content, products and services moving forward.

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## Strategize to raise awareness of technical assistance resources and expertise

<p><b>ACTION</b> <b>Document TA resources</b></p>	<ul style="list-style-type: none"> <li>• Identify recent resources that CTAA members may want (3 years)</li> <li>• Catalog CTAA resources and combine with N-CATT &amp; NCMM resources</li> <li>• Create profiles of CTAA staff expertise</li> <li>• Establish a process to refer to external resources through CTAA's library</li> </ul>
<p><b>ACTION</b> <b>Identify most effective methodology or format to promote [internal]</b></p>	<ul style="list-style-type: none"> <li>• Create a web-based, filterable, &amp; searchable platform that searches across CTAA TA resources and expertise</li> </ul>
<p><b>ACTION</b> <b>Identify platforms and venues used to promote [external]</b></p>	<ul style="list-style-type: none"> <li>• Launch a new search feature on member webinars</li> <li>• Promote in FastMail every 6 months over 3 years</li> <li>• Create a standard slide to be used with CTAA presentations</li> <li>• Promote at Expo</li> <li>• Promote to state associations</li> <li>• Create TA e-mail hotline for agencies (directed to member services, then gets directed to the staff member with the most relevant expertise)</li> </ul>

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**ACTION****Survey membership on  
CTAA's TA (customer survey)**

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**METRICS AND TARGETS**

**4.1. Number of visitors to CTAA TA web platform. Target = 100 visitors the first year, 10% annual increase over the next two years**

- Not yet begun

**4.2. Number of actionable e-mail requests to the TA hotline. Target = 20 e-mail requests per year**

- Not yet begun

**4.3. Satisfaction rate with CTAA's TA on annual survey. Target = 85% satisfaction rate**

- Not yet begun

**4.4 Percentage of people now aware of CTAA's TA offerings that were not before (via annual survey). Target = 20% annual change of people who did not know about CTAA's TA offerings who now know**

- Not yet begun

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**UPDATE** We recently hired – for the first time – a CTAA technical assistance staff member (Sage Kashner) whose job description is almost entirely devoted to communicating, promoting, and raising awareness of our TA resources and expertise (both internally and externally). Sage is actively engaged in delivering on the action items in this goal and we expect her efforts to allow us to hit the metrics and targets we identify here.

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# Increase the number of non-federal technical assistance contracts

<p><b>ACTION</b> <i>Identify potential customers in the non-federal space</i></p>	<ul style="list-style-type: none"> <li>• Use internal and external dialogue</li> <li>• Staff discussions</li> <li>• Board discussions</li> </ul>
<p><b>ACTION</b> <i>Market CTAA's experience in providing, citing past work</i></p>	<ul style="list-style-type: none"> <li>• Develop resource capturing CTAA's work and citing products and outcomes</li> <li>• Disseminate the resource and feature on websites and in social media</li> </ul>
<p><b>ACTION</b> <i>Dedicate staff time to pursuing new contracts</i></p>	<ul style="list-style-type: none"> <li>• This will occur on an as-needed basis</li> </ul>

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## METRICS AND TARGETS

### 5.1 Number of contracts executed. Target = 2 new contracts a year

- CTAA executed a contract with AECOM with the Massachusetts DOT to study statewide mobility management networks and make recommendations to MassDOT for what this could look like in their state. CTAA's expertise in mobility management was a key factor in AECOM being awarded this contract
- CTAA has executed a contract with New York State DOT to . . . [Related to: "We have added a number of training-related contracts with state departments of transportation over the past year."]
- Once the Arnall Family Foundation grant ends in 2024, CTAA will likely seek to leverage all of the processes and outcomes outlined in the Technical Assistance Strategic Plan to seek a new foundation grant for the Association

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**UPDATE** *We have added a number of training-related contracts with state departments of transportation over the past year. Once the Arnall Family Foundation grant ends in 2024, we will likely seek to leverage all of the processes and outcomes outlined in the Technical Assistance Strategic Plan to seek a new foundation grant for the Association. We have not yet developed this resource outlined in the document, but will do so with our newly hired communications staff member in 2024.*

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# TRAINING & CERTIFICATION GOALS

## Ensure accreditation of certification and training courses to include integrating continuing education units (CEU's) into all of the certification and training programs

### **ACTIONS**

- Talk with the University of Wisconsin-Milwaukee (UWM) to determine if they will authorize CEU's for all of CTAA training courses (not just PASS). Ask if they also have an accreditation process to review CTAA training courses
- Contact UWM regarding an agreement to offer CEU's for all our certification courses and inquire as to whether UWM can facilitate accreditation of these courses. If UWM can't offer accreditation, will research cost, submission process, timeline, and branding from a nationally recognized accreditation organization to review, evaluate and certify all training courses. For example, the International Association of Certification, Education and Training [www.iacet.org/pages/contact-us/](http://www.iacet.org/pages/contact-us/)
- Determine the cost, submission process and timeline for completion
- Upon successful completion of the accreditation process and brand CTAA's certification programs

**UPDATE** We have chosen to prioritize accreditation for PASS within this goal. We submitted a comprehensive response (more than 70 pages!) to our initial accreditation application with the Institute for Credentialing Excellence (ICE). Once we achieve accreditation, we will then engage with various university partners to enquire about CEUs in all of our programs.

## Engage with CTAA members to determine training trends

### **ACTIONS**

- Develop targeted questions to send to State Associations, State DOT's, EXPO Attendees and members using Survey Monkey platform
- Analyze the responses to determine which classes and teaching formats are requested
- Based on results, decide if new classes/certification course need to be created
- As applicable, determine timeline to create new courses and market to the industry

**UPDATE** Shortly after adoption of the Strategic Plan, we developed, disseminated and analyzed the results of a brief member survey on their training and certification program needs. We plan on doing that survey once again in the next 18 months to make it an ongoing, regular effort. In addition to the survey, we engage with members in a wide variety of ways to learn more about their training needs. These regular and ongoing engagements include, but are not limited to, participation in state, regional and national meetings; meetings with FTA; post EXPO surveys; "Build Your Own EXPO Workshop" efforts; membership webinars; and paying close attention to transit industry trends and issues. For example, our work with a member in Nebraska has led us to develop a small transit agency Board training curriculum, delivered in July.

## Work with state associations to determine which of their training courses meets the requirements for the Certified Community Transit Manager (CCTM) certification program

### **ACTIONS**

- Look at American Institute of Certified Planners (AICP) to review the process used to evaluate and cross market AICP certified courses
- Email State Association's to describe what the purpose is to evaluate and determine which of their courses meet CCTM requirements and discuss the marketing capabilities
- Create an evaluation process to include collecting the training course information and what report would provide value to share with the Association's about CCTM participation from their state

**UPDATE** In 2022 we fully updated the CCTM curriculum and have begun marketing and delivery CCTM training to members both in-person and virtually. Evaluations for the new CCTM course have been positive.



## Prepare for trainer turnover and develop a succession plan to have backup trainers for all training courses

### **ACTIONS**

- To ensure continuity of trainers as part of succession planning for retirement/turnover. Stephanee will compile a list of all courses, certification and non-certification, that CTAA offers. She will interview current trainers and reach out to other resources, along with creating a RFQ document. October 2021
- Review the current list of all Trainers
- Reach out to current trainers to determine if they have recommendations for back-up trainers.
- If they do, interview the trainers to determine if this is the best match
- If there is no trainer recommendation, reach out CTAA staff, state association training managers and create a Request for Qualifications (RFQ) document to send to the community transportation industry
- Select backup trainers and discuss working with CTAA

**UPDATE** In 2021 and 2022, the training team launched an initiative to build our training and certification program's bench strength with the goal of identifying –and in some cases actually testing – back-up trainers for key CTAA courses. This is an ongoing effort as we've learned during the pandemic that it is always vital to have redundancies built into your training delivery mechanisms, beginning with the trainers themselves.

## Develop a curriculum that incorporates diversity equity, inclusion and social justice as a new course offering to include in CTAA's training program

### **ACTIONS**

- Reach out to individuals and organizations recommended by the Training Committee to determine who to partner with and what will be included in the curriculum
- Develop a Scope of Work to have content developed for the course
- Determine who the instructors will be for the course
- Engage the expertise of the CTAA staff to provide input/review of the training curriculum
- Test the course with a supportive partner
- Announce and market the course to the community transportation industry

**UPDATE** *In our Training and Certification surveys, we learned that our customers are not actively asking for CTAA to develop a full-fledged product in this area. So to meet this goal, we have sought to provide training on equity, social justice, diversity and inclusion at the two most recent EXPOs (including at EXPO 2023 in Oklahoma City). Discussions with customer led us to develop these training workshops to highlight ways in which diversity, equity, inclusion and social justice can positively impact a member's current transit services. Thus far, we've looked at planning, service development and service implementation as direct ways to integrate these important topics into successful training for members. Also, we have recently developed and are now actively marketing and teaching an entirely new course entitled: *Leading with Emotional Intelligence: Changing Leadership in a Changing World*, which addresses some equity and inclusion topics within its curriculum.*

## Work with our tribal members and delegates to identify and address the tribal transit training requirements

### **ACTIONS**

- Ask CTAA staff to work with us along with their recommendations about how to reach out to tribal members. Determine which communication tools are best to get the best response and answer to questions about tribal training needs. Using tools such as, survey monkey, email, text message, phone calls
- Analyze information learned and an evaluation to determine which current classes need to be tailored and which courses need to be created

**UPDATE** *The membership and communication team, along with other CTAA staff, has actively reached out to the tribal transit community since the Strategic Plan was launched. CTAA staff have attended many tribal transit meetings at the state, regional and national level in the past two years – both virtually and in-person. We have developed an enhanced presence for tribes at the 2023 EXPO through both general conference speakers and FTA holding its first national tribal transit symposium at the 2023 EXPO. Further, we developed specific tribal-related resources through the FTA-funded Crime and Human Trafficking prevention grant and helped plan and lead an FTA webinar on the issue. From a strictly training perspective, we are working to develop a series of courses that we can offer to tribes both virtually and in-person or at EXPO every year. We will have staff in attendance at the FTA Tribal Transit symposium examining where we might find a unique topic or two for our training department to consider.*



ADVOCACY

GOALS

# Promote policies, programs and practices that remove transportation barriers to isolation, enabling access to jobs, healthcare and full economic and social participation for all persons, regardless of their age, race, income, geography or disability status

## ACTIONS

- Work with key Congressional offices, staff and committees
- Work with Federal agency staff/leadership
- Develop and work with partner organizations (public and private)
- Develop and share annual legislative goals/objectives

## TIMELINES

*These activities are all ongoing throughout the performance period and are difficult to schedule or anticipate. Association staff must always be prepared to fully and actively participate in all areas on an as-needed/as-requested basis.*

## METRICS

- Regular meetings, emails and communications with Congressional offices (committee and personal)
- Regular meetings, emails and communications with all levels of leadership at the Federal Transit Administration and other identified important federal agencies
- Regular meetings, emails and communications with key partner organizations
- Release annual legislative objectives every January

**UPDATE** *This goal embodies the totality of CTAA's work and mission. Therefore, we are clearly on track with meeting this goal and through the actions detailed above both in Advocacy as well as all of the other categories. We continue to maintain effective communication, including regular meetings and updates, with key congressional offices and committees. We have published every January our Legislative and Policy priorities. I meet monthly with FTA leadership. We continue to collaborate with an ever-growing number of partner organizations in furtherance of this goal.*

# Continue to increase CTAA's recognition by policymakers at the federal level (Congress, DOT, etc.) as the expert on, and voice for, rural, small-urban, tribal, non-emergency medical, and specialized transportation issues and to directly influence public transportation legislation and regulations

## ACTIONS

- Participate in Congressional hearings
- Work with key Congressional offices, staff and committees
- Work with Federal agency staff/leadership
- Increase CTAA visibility on transit issues with national media outlets
- Conduct successful CTAA Congressional Fly-In to include Board, Delegates and ELA members

## TIMELINES

- Hearings tend to either focus on a particular issue or revolve around a legislation effort (ie reauthorization)
- Engaging with Congressional staff and committees and with Federal agency leadership is ongoing throughout the performance period
- Engaging with media is ongoing and will be done throughout the performance period
- The CTAA Congressional Fly-In will be held each Spring

## METRICS

- Regular meetings, emails and communications with Congressional offices (committee and personal)
- CTAA being included as a witness (staff or designated member) in Congressional hearings; ideally at least annually
- CTAA being quoted and consulted on at least six occasions, annually, in national media sources
- CTAA holding at least 40 Hill visits during the Fly-In (ideally a combination of in-person and virtual)

**UPDATE** As noted above, we continue to maintain effective communication, including regular meetings and updates, with key congressional offices and committee. CTAA Leadership met with key new members of the House and Senate that have assumed leadership roles or membership in key committees. In April 22, CTAA testified before Senate Banking Committee on IIJA implementation. Every month, CTAA participates in a meeting with all FTA leadership, APTA and AASHTO. Since the adoption of the Strategic Plan, CTAA has been featured in transit articles in the Washington Post and NY Times, on NPR, and in numerous transit related podcasts. We are easily surpassing 6 such features annually. We held 58 meetings at our Hill Day 2023 earlier this month.

# Build the capacity of CTAA members (and state transit associations) to advocate for transportation at the local, state, and federal levels and ensure they are actively engaged, through a variety of two-way communications channels, on all Association legislative positions and priorities

## ACTIONS

- Develop/deliver advocacy/communications training for members
- Participate in state transit association meetings/trainings
- Meet regularly with state transit association leaders

## TIMELINES

These activities are all ongoing throughout the performance period and include timely responses to requests for CTAA presence at state/local conferences, periodic meetings with state/regional association leadership, and regular and useful analyses of key legislative activities.

## METRICS

- CTAA presence at 15-20 state/regional transit conferences every year
- At least twice annual CTAA-led update meetings on a teleconference/zoom meet with state/regional transit association leadership
- Timely CTAA analyses of key legislative activities
- When appropriate, provide clear, concise talking points for CTAA members on key legislative issues

**UPDATE** Every year since the passage of the Strategic Plan, CTAA staff has actively participated in 15-20 state, regional and national transit association meetings, often highlighting legislative and policy updates from Washington. To facilitate these sessions, internally we develop standardized legislative powerpoint slides for each staff member to customize prior to leading a session. We have met at least twice annually for the past three years with a group of state transit association leaders.

# Secure increased financial support for transportation with public and private funders

## ACTIONS

- Advocate for all forms of transit in FAST Act reauthorization
- Develop NEMT funding in Medicare and with healthcare entities

## TIMELINES

These activities are all ongoing throughout the performance period and are difficult to schedule or anticipate. Association staff must always be prepared to fully and actively participate in all areas on an as-needed/as-requested basis as much of this goal is dependent on unpredictable legislative schedules.

## METRICS

- The inclusion of NEMT and other non-traditional transit funding/funders in CTAA's annual legislative priorities
- CTAA's participation in non-traditional transit meetings and legislative coalitions
- The inclusion of NEMT, coordination and other non-traditional transit funding mechanisms in new legislative vehicles, as warranted

**UPDATE** The passage of the Bipartisan Infrastructure Law (BIL) in November 2021 brought significant, guaranteed funding increases to all forms of public transportation. Overall FTA funding moved from \$12b to \$21b. Funding for bus capital, particularly in the no/low program grew the most in the entire transit program. Our efforts allowed for a guarantee of 25% of the expanded no/low emission bus program to be set aside for low-emission buses. Tribal transit programs grew significantly. Since its passage, we've worked hard to ensure that the authorized spending levels get appropriated. On the NEMT front, CMS continues to expand NEMT into Medicare, largely through prior authorization being now allowed in repetitive, scheduled non-emergent medical transportation trips. Through both Congress and the Administration, we are routinely looped into any transit-related NEMT policy opportunities and we included a number of NEMT-related issues in our most recent two sets of annual legislative and policy priorities.