



South West Transit Association

Strategic Business Plan

Adopted September 2020





Letter from the SWTA Board

It is our pleasure to present the South West Transit Association Strategic Business Plan for 2021 - 2026. This plan reflects the input of our membership and business partners, the staff and the SWTA Board.

The Vision, Mission and Values provide the foundation for the plan's Key Areas of Focus: Expert Leadership, Focused Legislative Support, Relevant Education and a Strong Network of Communication. The team developed the strategic Goals and Objectives in each Key Area of Focus through an extensive series of feedback and meetings including local and national trends. Our strong commitment to protect and support our culture underlies every strategic Objective. These Objectives will guide the work we do to create ongoing value for our members.

The Strategic Business Plan is a tool that clearly captures the most important priorities and will direct the development of our services and resource allocation. We are confident that this year's planning process will lead to a comprehensive and responsive budget that balances the diverse needs of our membership through its emphasis on accountability, partnership, innovation, and efficiency.

We want to convey our appreciation to the members who provided their time and input to the process, to the Strategic Planning Team for their commitment, and to everyone who will continue to work on this Plan. As a living document, it is our commitment to update the strategic plan on a regular basis so that we can measure our success in coming years.

Sincerely,

South West Transit Association Board

ACKNOWLEDGMENTS PAGE

The SWTA Board and staff would like to thank and acknowledge the Strategic Plan Team, who volunteered a considerable amount of time and their expertise to create this plan for us. Your continued support of SWTA will continue to lead us to our vision: the leading transit power in the region, empowering members to improve public transportation and mobility.

Jeff Arndt
Rex Colorado
Laura Corff

Joel Gardner
Andrew Ittigson
Shelly Kreger

Mark Nestlen
Robert Nugent
Joshua Powers

Dinero Washington
Dawn Block
Kendra McGeady

La Quita Thornley
Rich Sampson
Kary Hughes



TABLE OF CONTENTS

| | |
|---|----|
| Letter from the Board | 1 |
| Acknowledgments | 2 |
| Table of Contents | 3 |
| Strategic Business Plan Overview | 4 |
| The Strategic Plan Process | 5 |
| The SWTA Nation | 6 |
| Vision, Mission, Core Values and Guiding Philosophies | 8 |
| Key Areas of Focus | 9 |
| Strategic Goals and Objectives | 11 |
| The Path Forward | 15 |

STRATEGIC PLAN SUMMARY

2021 - 2026

Mission

The Mission of SWTA is to strengthen member's ability to provide public transportation and mobility services across the region through education, communication, and advocacy.

Vision

SWTA is the leading transit authority, empowering members to improve public transportation and mobility.



Expert Leadership

Develop new leaders in the transit industry through mentoring, training and opportunities.

Achieve nationwide name recognition for SWTA.

Support and provide value to the state associations within the region.

Capture more membership within our existing region.



Focused Legislative Support

Effectively communicate SWTA members' legislative and regulatory priorities to lawmakers and Federal agencies.

Enhance strong personal relationship with federal legislators.



Relevant Education

Deliver timely, quality, specific and relevant training opportunities based on preferences (virtual or in person).

Keep pace with technology.



Strong Network of Communication

Enhance and create opportunities for member interactions.

Establish a clearinghouse of information

Enhance communication via media platforms.

Maintain SWTA's Commitment to VIPT and HT programs and initiatives.

Provide members who cannot obtain appropriate insurance with additional options.

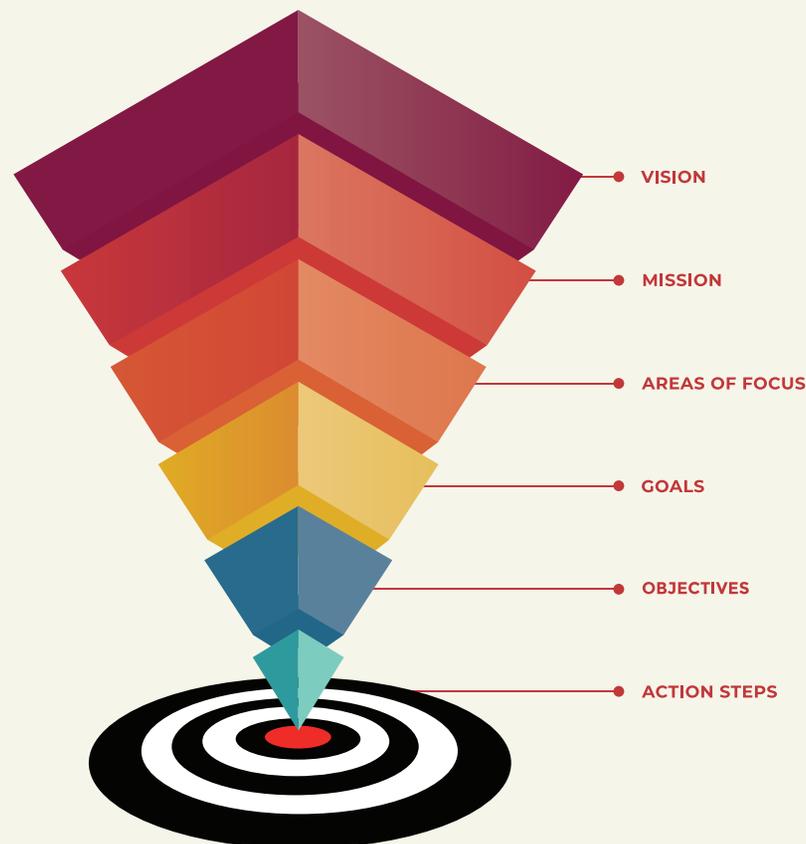
www.swta.org

THE STRATEGIC PLAN PROCESS

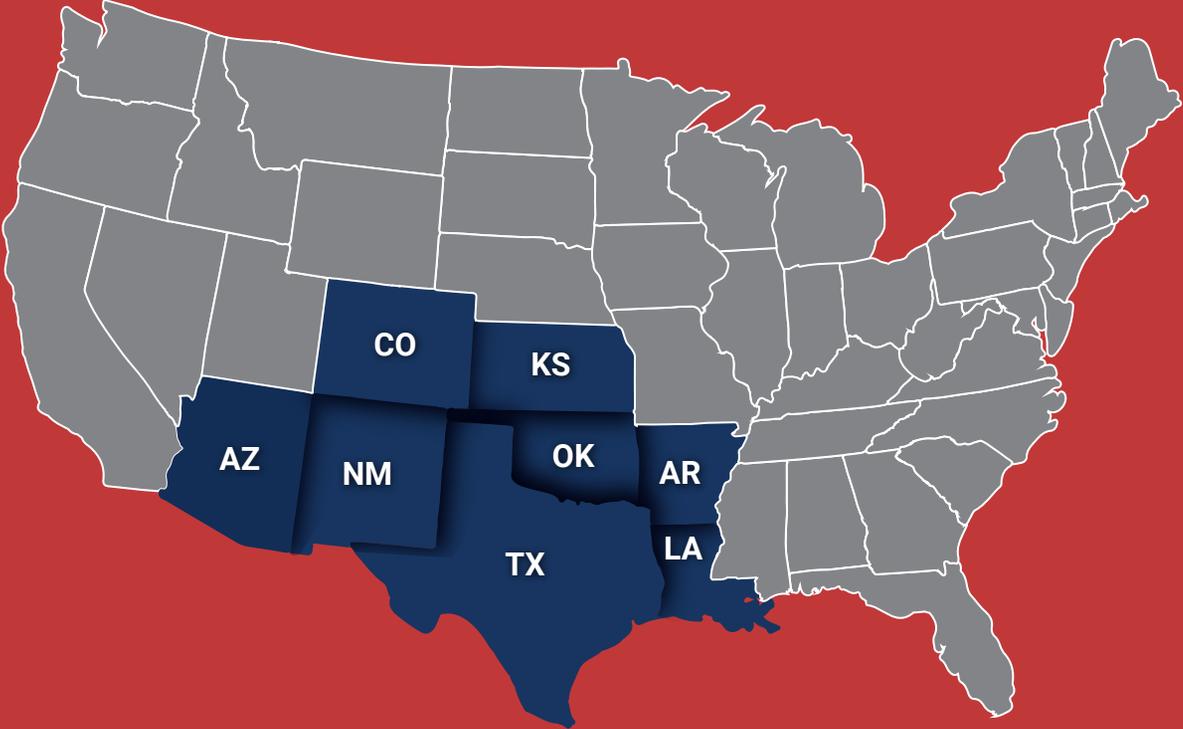
SWTA has a solid foundation of strategic planning over the years resulting in strong advocacy for members, relevant training and education, engage community, and a growing membership. This update to the strategic business plan was the result of a five-month process that involved the members, the strategic planning committee, the Board, and the staff in creating each component of the plan.

A member-wide survey started the process, which also included personal interviews and a two-day planning retreat held in late July. Those responses and information guided the formation of the Areas of Focus, the Goals, Objectives, and the Outcomes. Staff refined those Key Objectives and Outcomes into Action Steps focused on implementing the Strategic Plan.

The result is a long-range plan for the future of SWTA that is aspirational, realistic, and achievable.



THE SWTA NATION



56 Number of trainings



40 Number of communications annually



30+ Visits with Congressional Offices & FTA Leaders annually

Presenting Sponsor



Creative Bus Sales

Signature Sponsors

Ecolane
First Transit
Liquid Spring
New Flyer/MCI
Routematch
Transdev

Gold Sponsors

AECOM
Stantec
TripSpark

Silver Sponsors

Platinum Sponsors

Hallcon Corporation
MV Transportation
Proterra
Trapeze Group

Bronze Sponsors

Cubic Transportation
Systems
ENGIE
KFH Group
PC Trans

Official Media Sponsor

Conference Partners

Louisiana Department of Transportation
Louisiana Public Transportation Association (LPTA)



SOUTH WEST TRANSIT ASSOCIATION
STRATEGIC BUSINESS PLAN

TRANSIT



Louisiana Public Transit Association

Convention Center Hall 1



TownePlace Suite
to Hilton Shreveport, Shreveport

| | |
|----------------------|-----------------------|
| Sunday, February 23 | Monday, February 24 |
| To Hilton Shreveport | To Convention Center |
| 4:45 – 5:15 p.m. | 7:30 – 8:30 a.m. |
| Return to TownPlace | Return to TownPlace |
| 6:30 – 7:00 p.m. | One trip at 7:45 p.m. |

Provided by



SWTA STANDS APART IN REINFORCING THAT TRANSIT MATTERS EVERYWHERE. IT'S AN ORGANIZATION THAT'S FOCUSED WITH CLEAR, ACTIONABLE PRIORITIES BUT CAN TAKE SOME RISKS TO PROVIDE EXPERT LEADERSHIP IN OUR INDUSTRY. AND WHEN YOU'RE WORKING WITH SWTA, YOU KNOW YOU'RE WORKING WITH FAMILY.

VISION, MISSION, CORE VALUES AND GUIDING PRINCIPLES

Vision

SWTA is the leading transit authority in the region, empowering members to improve public transportation and mobility.

Mission

The Mission of SWTA is to strengthen members' ability to provide public transportation and mobility services across the region through education, communication, and advocacy.

Core Values

Accountability: We measure our performance to the highest standards.

Diversity: We believe our differences make us stronger and combining our different backgrounds, experiences and world views drives better results.

Excellence: We exceed expectations and always add value for our members and partners.

Honesty: We are transparent and forthright, and we openly collaborate to find the best approach to solving problems.

Inclusivity: We are the SWTA Nation! Friendly, welcoming, and respectful of new ideas and feedback for improvement.

Innovation: We continuously improve and find new and better ways to provide services to our members.

Integrity: We know what is right and we do what is right.

Guiding Principles

Guiding Principles are the broad philosophies of SWTA that guide us in our decision making in all circumstances, irrespective of changes in our goals, strategies, or objectives. They create the SWTA culture where everyone understands what is important.

- We are a strong regional presence and provide opportunities to expand our geographical area
 - We have a culture of inclusivity, friendliness, approachability, and enthusiastic idea sharing
 - We have a proven ability to provide more personal and customized services to members
 - We are fiscally responsible: no-frills, economical and efficient member services
 - We have an ability to have fun and not always take ourselves seriously
-

AREAS OF FOCUS



Expert Leadership

We are leaders in the transit industry, supporting our members at all levels and taking a role on issues of importance.

Outcomes

- A new generation of transit leaders
- The transit industry turns to SWTA for expert opinions on key issues
- Nationwide name recognition
- Thriving, competent and successful members
- Increased membership
- Sustained and increased membership



Focused Legislative Support

We serve as the voice for our members at the national and regional level, and champion transit related policies and legislation that directly benefit our members. We are able to advocate clear positions on legislation and key issues.

Outcomes

- Funding and resources for members to safely and effectively improve transit options
- Name recognition for SWTA among policymakers
- Challenging issues will be addressed
- Growth in transit
- Strong and respected voice for SWTA members

AREAS OF FOCUS



Relevant Education

We provide timely and focused education and training through conferences, presentations, webinars, newsletters, and emails for our members that meet their needs.

Outcomes

- We will keep pace with technology
- Increased membership
- Leadership and succession planning for SWTA membership
- Increased revenue
- Relevant and high-quality training
- New trainers and topics provided for members



Strong Network of Communication

We are a resource for our membership, serving as a clearinghouse for information and sharing of ideas. We provide a network of timely and relevant communication about the issues that are of most importance.

Outcomes

- Members will have better access to information
- Members will be better informed leaders
- Expanded access to resources across the region
- Members will communicate one on one

Key Area of Focus: Expert Leadership

Outcomes

A new generation of transit leaders
The transit industry turns to SWTA for expert opinions on key issues
Nationwide name recognition

Thriving, competent and successful members with better options
Increased membership
Sustained membership annual renewal rate at 88% now

Goal

Develop new leaders in the transit industry through mentoring, training and opportunities

Objectives

Implement recognition, participation and programs for emerging leaders
20% of new members will be millennials.

Goal

Achieve nationwide name recognition for SWTA

Objectives

Increase conference attendance (from attendees NOT in the region) by 5% over current numbers

Applications from professional and business members increase by 5% (over current levels) from non-SWTA states

Goal

Support and provide value to the state associations within the region

Objectives

Increase in membership because the state association leadership is promoting SWTA to their members This means SWTA provides increased training, presentations and associated leadership roles at state conferences

Goal

Capture more membership within our existing region

Objectives

10 new members throughout existing region

Key Area of Focus: Focused Legislative Support

Outcomes

Funding and resources for members to safely and effectively improve transit options
Name recognition for SWTA among policymakers
Challenging issues will be addressed

Growth in transit
New trainers and topics provided for members

Goal

Effectively communicate SWTA members' legislative and regulatory priorities to lawmakers

Objectives

Increase number of meetings with congressional offices and FTA each year
Increase legislation that includes SWTA legislative priorities

Goal

Enhance strong personal relationships with federal legislators

Objectives

Increase direct legislative interactions at SWTA events each year
Increase % of legislators and their reach out to SWTA for input in shaping legislation

Key Area of Focus: Relevant Education

Outcomes

We will keep pace with technology (internally and for our members)
Increased membership
Leadership and succession planning for SWTA membership

Increased revenue
Relevant and high-quality training
New trainers and topics provided for members

Goal

Deliver timely, quality, specific and relevant training opportunities based on preferences (virtual or in person)

Objectives

Revamp training at all levels with new trainers and new education, maintaining SWTA's commitment to member relevancy
Increase maintenance trainings by 20%
Increase participation in training opportunities by 10%

Goal

Keep pace with technology

Objectives

Use technology to increase relationships with millennial members

Key Area of Focus: Strong Network of Communication

Outcomes

Members will have better access to information
Members will be better informed leaders

Expanded access to resources across the region
Members will communicate one on one

Goal

Enhance and create opportunities for member interactions

Objectives

Increase participation from millennials by 15%
Increase sharing of member's accomplishments and projects by 20%

Goal

Establish a clearinghouse of information

Objectives

Create online member portal

Goal

Enhance communication via media platforms

Objectives

Increase hits on website and social media engagements by 25%

Goal

Maintain SWTA's Commitment to Veterans in Public Transit and Combatting Human Trafficking programs and initiatives

Goal

Provide members who cannot obtain appropriate insurance with additional options



THE PATH FORWARD

A strategic plan should never collect dust or sit on a shelf – it is a living document. The plan may need to be adjusted due to unforeseen circumstances and was designed to be flexible and adaptable to changing needs of the membership, the economy, and many other factors.

SWTA will use the information and lessons learned from this plan to make decisions about policies, programs, and services. Through various paths such as the budget, training materials, and daily activities of the staff, this plan will come to life and be continuously updated and improved. A key part of that will be the implementation plan created by the staff, as well as a regular reporting process to the Board and membership.

We appreciate your efforts. As we move into the future with this living document, we look forward to realizing our vision of SWTA.



If you have any questions about the plan
or the process, please reach out to:

Rich Sampson

EXECUTIVE DIRECTOR

South West Transit Association | rsampson@swta.org |
www.swta.org | 817.295.3663 (o)

