



Strategic Plan 2014-2019

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Executive Summary

The Wisconsin Urban and Rural Transit Association (WURTA) is a not for profit advocacy group representing a broad range of public transportation providers throughout the State of Wisconsin. Representing 28 bus systems, 43 shared-ride taxi systems and 24 vendors, it provides a strong and cohesive voice Wisconsin transit.

In June of 2014, WURTA contracted with Connelly Coaching and Consulting, LLC and Brecon Hill Consulting, LLC, to work with the organization to create a Five Year Strategic Plan and to address a number of key issues facing the organization. Joseph A. Caruso and Anita Gulotta-Connelly were the primary consultants on the plan.

The plan included herein grew out of three key activities: a focus group; a member survey and a Strategic Planning and Visioning Day. Representatives from large and small transit systems from across the state participated in various parts of the process to evaluate current efforts and craft a plan for the future. Comprehensive information from each of these activities is included in this document.

Several messages emerged clearly from these activities:

- Members are very supportive of WURTA and value their association with the organization.
- Members rely on WURTA to establish and carry forward their legislative agenda. This is an activity of the utmost importance for the organization and it must continue to function effectively in this area despite changes in legislative liaison personnel.
- WURTA provides an important source of networking; mentoring and support for Wisconsin's transit professionals. Activities in this area need to be continued and expanded.
- WURTA has developed an extensive network of relationships with other organizations across the State. It is important that those relationships be solidified and expanded.
- In addition to replacing the legislative liaison, WURTA members feel very strongly that the organization needs to consider hiring an Executive Director to support its activities and initiatives and is critical to the continued effectiveness of the organization.

Activities to support these themes form the basis for the strategic plan. The plan is divided into six sections: Foundation Activities; Financial Resources; Organization Staffing; Legislative Initiatives; Member Engagement and Support; and Organizational Structure and Partnerships. Key activities are listed under each section to identify the steps needed to move the organization forward in each area.

The plan represents a solid and ambitious endeavor for this organization, but with the energy and support of the current members, the plan can definitely bring the organization to the next level of effectiveness.



Strategic Plan: 2015 - 2019

Background

The Wisconsin Urban and Rural Transit Association (WURTA) is a not for profit advocacy and education group representing a broad range of public transportation providers throughout the State of Wisconsin. The organization is about 40 years old and is run by volunteer officers and directors from its member organizations. In June of 2014, WURTA contracted with Connelly Coaching and Consulting, LLC and Brecon Hill Consulting, LLC, to work with the organization to create a Five Year Strategic Plan. Joseph A. Caruso and Anita Gulotta-Connelly were the primary consultants on the plan.

In 1974, WURTA began life as the Wisconsin Urban Transit Association (WUTA). The organization changed its name in 2001 to reflect the growth of public transportation options in rural areas and to be more inclusive of those efforts. As WURTA approaches 2015, it is looking for ways continue to provide value to its members and to further include others with the common goal of supporting strong and sustainable public transportation in Wisconsin. The Strategic Plan detailed herein builds on the strategic vision for the organization developed by the prior plan in 2000 and provides a comprehensive blueprint for the next five years that will challenge the organization and help it maximize its effectiveness for public transit.

The Strategic Planning Process

Oversight for the strategic planning process was provided by a Strategic Planning Committee comprised of the following members:

Crystal Martin, WURTA Chair; Madison Metro

Mike Branco, WURTA Vice-Chair; Eau Clair Transit

Greg Seubert, Immediate Past Chair; Legislative Committee Chair,
Wausau Transit

Brian Engelking, WURTA Secretary; Waukesha Transit

Michelle Gavin, At-Large Board Member; Beloit Transit

Richard Running, Taxi Member Board Member; Running, Inc.

Patricia Kiewiz, Operations and Safety Committee Chair; Green Bay Transit

Derek Muench, Paratransit Committee Chair, Shoreline Metro (Sheboygan)

Tom Waby, BART

Tracy Harrington, Milwaukee County Transit System

The planning process began with a June 23, 2014 focus group session comprised of the Strategic Plan Committee. A series of question, developed by the consultants provided the basis for an extensive discussion about the strengths and weaknesses of the organization, as well as the expectations of the transit system members. A summary of the answers to the focus group questions is provided in **Addendum A**.

Issues surfaced during the focus group session were developed into a member survey. During the early part of July, over 85 WURTA members were requested to respond to this survey. The survey consisted of 18 questions, all of which allowed for multiple choices, and most allowed respondent comments.

At the close of the survey there were 35 respondents, representing a very good response rate of just over 40 percent or twice what is usually expected by marketing professionals. Nearly all the respondents completed all the questions which also represents an above average response rate. A copy of the survey is included in **Addendum B**. The summary of the results of the survey are included in **Addendum C**.

From the survey it is apparent that the members particularly value WURTA's legislative efforts. They also value the opportunity to share knowledge, network and learn from others. Overall, members were very satisfied with their association with WURTA. Areas where WURTA could improve

include: more member participation; stronger legislative efforts and better internal and external communications.

The consultants also met with WURTA's long time legislative liaison, Gary Goyke, to obtain his insight into WURTA's future. His comments confirmed the challenges facing transit in the highly polarized political climates in both Madison and Washington. He stressed that it was extremely important for WURTA to continue to work with a broad coalition, as many of these groups have a broader base of political support that can assist transit in this polarized environment. He also urged pursuit of tax-exempt status so that the organization could apply for grants to fund organizational costs and specific projects.

Finally, all twenty-three transit system members of WURTA were invited to participate in a one day Strategic Planning and Visioning Day held in Madison on July 30, 2014. Thirteen individuals, representing transit systems from across the State, were able to participate in this event. The day began with a review of materials produced by the consultants regarding key issues identified by WURTA. (Insurance; Tax-Exempt Status; and a Partner Organization Summary.) The consultants also reviewed the results of the survey.

After this, participants were asked to envision the "new and improved" WURTA that will exist five years from now. They were also asked to identify the key things that WURTA did over those five years to reach that vision. See **Addendum D**. Responses were solicited from all participants and two rounds of prioritizing took place to develop consensus for the most appropriate and productive courses of action. The results from this process are summarized in **Addendum E**. Actions identified by this process became the basis for this strategic plan.

Several messages emerged clearly from these activities:

- Members are very supportive of WURTA and value their association with the organization.
- Members rely on WURTA to establish and carry forward their legislative agenda. This is an activity of the utmost importance for the organization and it must continue to function effectively in this area despite changes in legislative liaison personnel.
- WURTA provides an important source of networking; mentoring and support for Wisconsin's transit professionals. Activities in this area need to be continued and expanded.

- WURTA has developed an extensive network of relationships with other organizations across the State. It is important that those relationships be solidified and expanded.
- In addition to replacing the legislative liaison, WURTA members feel very strongly that the organization needs to consider hiring an Executive Director to support its activities and initiatives and is critical to the continued effectiveness of the organization.

The Strategic Plan described below details the activities needed to move WURTA forward over the next five years. It is based on the concept of having an organization with an Executive Director. Many of the initiatives desired by the membership are embedded in that job description. If WURTA determines that it is unable to generate the resources to hire an Executive Director, then the activities outlined in this plan will need to be re-evaluated and re-prioritized to fall within the time constraints of a continued all-volunteer organization.

The 2015 – 2019 Strategic Action Plan

Foundational Steps

In order to begin working on a number of actions discussed in this plan, it is necessary for WURTA to take care of a number of foundational steps to assure that future actions are done in a context of the following actions:

1. Update by-laws as needed to reflect current situation and have the revised by-laws adopted by the WURTA Board of Directors and members as soon as possible.
2. Hire a tax attorney familiar with non-profits to assist in documentation of current organizational status and recommend and assist with the implementation of a future tax status for the organization. Overview of the consultant's research and recommendations in this area are provided in **Addendum F**.
3. Secure the services of an insurance professional who has experience with director and officer insurance for non-profits, and purchase a level of coverage that appropriately protects the organization and its assets. Overview of the consultant's research and recommendations in this area are provided in **Addendum G**.
4. Create a process that assures the preservation of organizational documents and records.
5. Conduct a thorough review of WURTA's revenue and expenditures over the last several years to develop a comprehensive Financial Plan for the organization. This plan would address what is required financially to sustain the organization's current level of efforts, before moving forward with an expanded scope of activities. It would also address the issue of organizational financial reserves; provide a schedule for future member dues; and explore sources of other revenue for the organization, such as contributions and grants.

Financial Resources

This section anticipates increased expenses due to the hiring of staff for WURTA, as well as the undertaking of additional organizational initiatives, and recommends the following four actions be undertaken as soon as possible:

1. Study the availability of grants for organizational operations, restructuring, etc., and determine the long term prospects for this revenue source. This may influence the choice of tax-exempt

status pursued. It will also influence the level of dues required to support the organization long-term.

2. Determine an estimated budget for the staffed organization.
3. Thoroughly examine the current dues structure and membership categories to allow for a maximization of membership generated revenues in order to support staff.
4. Charge close coalition members to recover costs for conference planning and joint lobbying efforts.

Organizational Staffing

The planning process surfaced a strong desire to have WURTA hire professional staff. In examining the comments and future vision of those involved in the process, it was apparent that there were extensive skill sets required for staff, and that the skills needed are different enough to consider splitting the duties of an executive director and legislative liaison as discussed in the recommendations below:

1. Hire an executive director with the following duties and skills:
 - Management ability to handle the day to day business of WURTA
 - Communicate effectively internally and externally by using traditional and emerging communications channels.
 - Research and apply for grants that move the organization toward its key goals and member engagement and education
 - Has the ability to develop and manage educational and knowledge sharing opportunities for members as well as be the lead on planning the annual conference.
 - Can recruit and assist in member recruitment, retention and engagement
 - Ability to be the public face and voice of WURTA
 - Be able to develop and nurture coalition partners
 - Understand the value of well-timed and planned public relations activities
 - Ability to work with lobbyist and WURTA Board to develop and implement WURTA legislative agenda and ensure timely engage of membership in this process

2. Hire a legislative liaison with the following duties and skills to be put to use at both the state and federal level:
 - Has passion for the mission of public transit and the people served by public transportation

- Has appropriate and current political connections and understands the political process
- Uses proven effective techniques to gain support for legislative initiatives
- Ability to “work both sides of the aisle” at the State and Federal level
- Has the ability and willingness to train and engage transit system members in the legislative process as well as help them help themselves by training them to identify and connect with local elected officials and representatives as well as sympathetic local grass roots organizations
- Work with the executive Director and the Board to establish a legislative agenda and pro-actively communicate and mobilize members well in advance of key legislative contacts and process points.

Once more formal job descriptions are established, the WURTA Board can determine whether these are full or part-time positions. The level of effort needed may change over time as well, once programs are established and running smoothly, or as legislative efforts change.

Legislative Initiatives

Based on the planning process members identified the following major legislative initiatives for the next five years. They are placed in an order of priority in that one flows into the next and upon completion would likely compliment the next priority. It is also important to note that each of these initiatives will need separate and cohesive plans that are jointly developed by the WURTA Board of Directors, the WURTA legislative liaison and the WURTA Executive Director.

1. State transit funding stays in the Transportation Fund through at least 2020
2. Secure long term and stable state funding for transit operating purposes.
3. Secure increased capital funding resources through the state and/or federal government.
4. Secure statewide RTA enabling legislation.

Member Engagement and Support

One of the values clearly associated with membership in WURTA was the ability to share knowledge and experience. However, there was also a need to spark more member involvement to do the work of the organization and take advantage of what WURTA offers. The following items are recommended as priority items identified in the planning process:

1. Design and implement a welcoming and mentoring system for new members; new associate members and new system managers. The vice chair and the at-large board members could take the lead in this process. In addition, committee chairs could be tasked with developing a similar process with new members at other levels in their organizations.
2. Assign the development of a document sharing feature on a “Members Only” section of the WURTA web site.
3. Although an annual leadership conference was suggested, this may be beyond the scope of this five year plan, given the scope and importance of other initiatives. An initial step would be to integrate at least one substantive leadership development session in conjunction with the annual transportation conference.
4. In order to encourage more peer to peer contact and knowledge sharing, establish a process that allows for the circulation of questions and discussions related to operations and other issues among defined groups within WURTA.
5. Encourage transit system members to have more staff involved in WURTA by using remote meeting technology

Organizational Structure and Partnerships

The linking of WURTA to other groups concerned with the success and effectiveness of public transportation has resulted in a broader and more effective voice for the industry as a whole. The following actions are recommended as a way to move forward with these relationships:

1. Continue discussions with close coalition organizations concerning the possibility of their being merged into WURTA. **Addendum H** outlines the parameters of each of these groups. It may be appropriate for some of these groups to fully merge with WURTA. Others groups may chose to remain separate, with more formal agreements in place with WURTA in relation their support of the conference and lobbying. WURTA may have to review and revise its by-laws to allow for these changes.
2. Formalize and solidify relationships with “Friends” oriented organizations. These groups are good partners for WURTA

relative to the development of compelling and consistent reports and messages that support good public transportation. Because they directly represent individuals who use and/or value transit, their credibility and expertise in issues of policy, the environment, public opinion, etc. is far reaching. It is important that WURTA solidify these relationships, establish regular communications and work together to develop consistent messaging. WURTA should also explore the possibility of seeking out grants that can be used jointly, or awarded fully to some of these groups to develop the data and reports that best support public transportation.

3. It is important that these highly targeted core message and support relationships be developed and solidified before the organization attempts to recruit members of other non-traditional groups. The organization can then determine what value it can provide to non-traditional groups (What do they get out of joining WURTA?) and what messages will resonate with other demographic groups such as Millennials, conservatives, etc. (Why should they support public transportation?)
4. Finally, the planning process identified that WURTA members should take leadership roles in regional coordination efforts. While worthy of consideration, the appropriateness of this approach is most likely a decision that should be made at the local transit system level. WURTA could encourage such involvement and provide support for those organizations that wish to assume this role.

Conclusion

This plan represents the transit system member's vision for the future of WURTA. It charts a course to strengthen the current organization; allow it to grow; and prepare it for anticipated challenges. As with all strategic plans, it will evolve as progress occurs and events unfold within the organization. The good news is that WURTA is a strong and healthy organization that is looking for ways to become even more effective. This plan provides detailed action steps to move the organization toward that future.

Addendum A:

WURTA Focus Group Session Summary

June 23, 2014

Participants: Crystal Martin, Tom Waby, Richard Running, Patty Kiewiz, Brian Engelking, Tracy Harrington, Derek Muench.

Participants in writing after the session: Michelle Gavin, Mike Branco

Why does your organization belong to WURTA?

- Provides a powerful unified voice for transit
- We all have similar issues – makes sense to work together
- It is a good way to learn about other transit systems in the State
- Committees share information about best practices
- It is valuable to get together and talk about issues – APTA/travel is too expensive
- It brings in vendors for us to talk with
- Advocates for transit funding
- Provides education
- Help us to meet our core values: safe, affordable and reliable transportation
- Brings all the systems together with a unified legislative agenda – keep larger and smaller systems from being played against each other
- Fellowship
- Networking – we learn from each other – give us more credibility with our Board
- It is like an insurance policy – when you need help on something, it is there
- WURTA is a good resource – keeps us informed on legislative issues and advocates for us

Describe one accomplishment of WURTA?

- Kept transit funding in the transportation fund
- WURTA has a good reputation – very credible – helps them to be effective legislatively
- Gave transit a seat at the table in the audit of the brokerage
- Proposal for 4% increase in 85.21 funding
- Formed a broader coalition with others outside of transportation – effective
- Established relationships for us at the Federal level
- Earmarks – We were very successful because of WURTA and WISDOT
- Good relationship between WURTA and WISDOT helps transit systems
- Positive resolution of the “Agency Fare” issue
- WURTA and WISDOT – marketing grants
- WURTA and WISDOT – statewide purchasing of AVL/IT equipment
- FUNDING
- Gives a larger presence of public transit in the State than any one transit provider could do.

Describe one benefit or “good thing” that resulted from your/your organization’s WURTA membership?

- Agency fare – because of this a lot of money has been saved by the system – helped to preserve the fixed routes (this was cited by several individuals)
- RTA legislation – two cited this
- Able to bring back information to the municipality
- Conferences – networking with other managers
- Learn so much from everyone else
- Committees – great sharing of information – great training
- Able to restore some funding cuts because of funding increases obtained by WURTA
- Legislative advocacy

What are the three most valuable or important reasons for WURTA to exist? (The number in parenthesis indicates how many times that answer occurred.)

- Strength of many/lobbying/one voice (8)
- Shared knowledge (7)
- Management development (4)
- It is a presence to be consulted (3)
- Keeps systems strong through collective effort (2)
- Broad coalition (2)
- Provides internal and external communication
- Marketing of transit
- It is a vehicle for relationships – for agencies, personally and professionally
- It is a magnet to bring people together around transit
- Because of its reputation it is a magnet for other organizations
- It is a good force to kick-start issues
- WURTA focuses on the future while we are busy taking care of today
- Joint training opportunities – more affordable as part of the group

Please tell us about your experience on any of the WURTA committees on which you serve. Are committees serving the purpose for which they were intended? Why or why not?

- Generally positive
- Are serving their purpose
- Participation has peaks and valleys depending upon hot topics
- Distance makes it difficult for people to participate – may need to better leverage technology
- Some systems do not participate at all – wait for other system to do the work
- People do not want to step up to lead committees – too much work, responsibility
- Committee participation and leadership is a good way to develop leadership for the next level
- Transit systems should go deeper in their organizations and encourage committee membership – WURTA is not just for managers

- Vendor members want access to the transit system members who use their product – committees can facilitate this
- New people take over at transit systems by do not participate and take over committees in WURTA
- Need a closer relationship between the Committees and the Executive Board – more status updates
- Committees might be more effective if they were tasked with things that would benefit the entire membership
- An issue for the strategic committee to consider is what is the intended role of the finance committee...if the “same old, same old” is to be expected, the same concerns repeated each time an “audit” is done, what is the point? Going forward, it would make sense to structure how expenses and reimbursements are handled. Some written requirements should be developed.

On a scale of one to ten with one being lowest and ten being highest, how would you rate WURTA’s legislative effectiveness? In addition write down one way, **that WURTA controls**, that would improve that rating.

Ratings: 10 - 1; 9 - 3; 8 - 3; 6 – 2

Ways to improve:

- Hire more lobbyists
- More money for legislative work
- Best respected lobbyist
- Better focus of efforts – just go after what you really have a chance of getting
- Hire a lobbyist dedicated full time to transit issues
- Better communication within the organization on legislative issues – and use new channels – Twitter etc.
- Train members on talking to legislators

Ways to generate more money for lobbying:

- More members
- Raise dues
- Get grants for other activities – use the money from those activities for lobbying
- Join forces with workers

If you had to start WURTA from scratch, how would you structure/organize it?

- Organization is unsure of how it is currently structured
- Largely unable to generate ideas for new structure
- The structure should follow the purpose
- One view – WURTA is missing an opportunity to include some of the umbrella organizations in to one big organization - WURTA is big enough to support a small staff to help organize things and do some leg work on the memberships behalf.

- Some overall questions
 - What is the relationship between the “Board” and the “Executive Committee”
 - Legislative and Executive committees hold joint meetings. Do Legislative Committee members have a vote on “Board” issues?
 - Where do the “regular members” fit in? Do they have a vote? On what?
- Some issues raised relating to relationship between committees and the Board/Executive committee –
 - Should Committee chairs be on the Board?
 - Should Executive Committee members still retain control of committee chair position?

Some questions to consider:

- Does WURTA need to look at which members are not participating (on committees or elsewhere) and look for ways to draw them in?
- Does WURTA do a good job of pulling in new members/new general managers to participate?
- Should WURTA be encouraging transit system members to encourage more participation from below the level of General Manager?
- Does WURTA know how much work (time, \$) the current lobbyist is doing for other organizations that is being subsidized by WURTA? On the flip side...In what ways does WURTA benefit from the current lobbyists affiliations with other organizations?
- An issue for the strategic committee to consider is what is the intended role of the audit committee...if the “same old, same old” is to be expected, the same concerns repeated each time an “audit” is done, what is the point? Going forward, it would make sense to structure how expenses and reimbursements are handled. Some written requirements should be developed.

Addendum B: WURTA Survey

WURTA STRATEGIC PLANNING: MEMBER SURVEY

The following survey is designed to help focus research and eventually recommendations regarding the future of WURTA. Your responses and opinions will be combined with all respondents, be kept in confidence and not shared in an individual manner.

1. What are the most important reasons for WURTA to exist? (Check three only):
 - a. Provides a strong lobbying voice
 - b. Helps develop more skilled transit managers
 - c. Provides opportunities to share knowledge
 - d. Offers a broad coalition on transit issues
 - e. Is a presence to be consulted by local, state and federal officials on issues related to public transportation
 - f. Helps build productive relationships for members and their organizations
 - g. Has a future focus that allows members to take care of present day issues
 - h. Helps to strengthen the state's transit industry reputation through marketing and communications
 - i. Provide contact between vendors and members
 - j. Other (Please describe): _____

2. Of those mentioned above, which ONE in your personal opinion, is THE most important? (Choose only one)
 - a. Provides a strong lobbying voice
 - b. Helps develop more skilled transit managers
 - c. Provides opportunities to share knowledge
 - d. Offers a broad coalition on transit issues
 - e. Is a presence to be consulted by local, state and federal officials on issues related to public transportation
 - f. Helps build productive relationships for members and their organizations
 - g. Has a future focus that allows members to take care of present day issues
 - h. Helps to strengthen the state's transit industry reputation through marketing and communications
 - i. Provide contact between vendors and members
 - j. Other (Please describe): _____

3. What are the three most important reasons for **your organization** to belong to WURTA? (Choose up to three responses)
 - a. It's a good way to learn about other transit systems in the state
 - b. Sharing of knowledge and best practices through networking and other educational opportunities
 - c. Strength of working together on common issues regardless of system size
 - d. WURTA's legislative advocacy and organizational unity on funding and other common issues

- e. Helps us meet our core values of safe and reliable transportation
- f. Provides opportunities to keep up to date on transit products and services as well as meet and interact with vendors
- g. Helps us create credibility on transit issues with local elected officials and governing bodies
- h. Other (please describe): _____

4. In thinking about the WURTA's organizational weaknesses, pick three items from the following list that you believe make/have made WURTA a less effective organization (Select three only):

- a. Legislative effectiveness: _____
 - b. Collaboration with too many organizations: _____
 - c. Collaboration with too few organizations: _____
 - d. Collaboration with the wrong organizations: _____
 - e. Member dues and conference revenues are not enough to do what is needed: _____
 - f. The organization takes up too much of my time: _____
 - g. Not enough or not the right mix of vendors are represented: _____
 - h. Too many issues are being worked on at once: _____
 - i. Internal communications aren't effective or consistent: _____
 - j. External communications aren't effective or consistent: _____
 - k. WURTA needs stronger leadership: _____
 - l. WURTA members need to participate more: _____
 - m. Other: _____
- Comment: _____

5. In thinking about WURTA's opportunities in the next five years, pick three items from the following list that represent opportunities for WURTA to become a more effective organization:

- a. Improved communications focused on issues: _____
 - b. Change in the way WURTA is organized: _____
 - c. Changes in the amount of time spent, skill set or focus of WURTA's lobbyist: _____
 - d. Focusing WURTA efforts on fixed route, paratransit and shared ride taxi operations only: _____
 - e. Being more selective in the organizations WURTA partners with: _____
 - f. Expand WURTA's efforts to partner with organizations interested in public transportation: _____
 - g. Encouraging smaller transit related organizations to be fully integrated into WURTA: _____
 - h. Revise the committee structure: _____
 - i. Improve opportunities to learn and exchange information: _____
 - j. Increase dues and/or membership to allow for more funds to do association business: _____
 - k. Other (Please describe): _____
- Comment: _____

6. WURTA uses its annual conferences to engage members by providing opportunities to learn more about effective transit management, state and federal policies, and other topics of interest through its conferences. Please rate WURTA's conference effectiveness on a scale of one to ten with ten being the best and one the worst: _____

Comment: _____

7. WURTA attempts to engage members at the committee level by providing opportunities to exchange ideas, discuss issues of mutual interest and solve common problems. Please rate WURTA's committee networking effectiveness on a scale of one to ten with ten being the best and one being the worst: _____

Comment: _____

8. Do you currently participate on one of WURTA's standing or ad hoc committees (Other than its Board)? Yes: _____ No: _____

If yes, go to Question 9.

If no, please tell us why (below) then skip to question 10.

9. Please rate the following on a scale of one to ten with ten being the best and one being the worst:

a. Frequency of committee meetings: _____

b. Format of meetings: _____

c. Content of meetings: _____

d. Opportunity to learn or exchange ideas: _____

e. Productivity of committee: _____

f. Overall satisfaction with your committee experience: _____

Comment: _____

10. In your opinion does WURTA have (Choose only one):

a. Too many committees? _____

b. Not enough committee? _____

c. Has the appropriate number of committees? _____

d. Don't know/Have no opinion: _____

Comment: _____

11. Is there a committee(s) that you would suggest be created, eliminated or combined?

Yes _____ No _____

If yes, please describe your suggestion: _____

12. WURTA maintains a close working relationship to the following organizations: WATO, WRAPP, WAMM, SMVAW, and All Aboard Wisconsin. With regard to WURTA's relationship with these organizations, please rate the following on a scale of one to ten with ten being the best and one being the worst:

a. Cooperation and collaboration: _____

- b. Common interests: _____
- c. Advancement of transit support and funding: _____
- d. Exchange of ideas: _____
- e. Overall need for this broad a coalition: _____

13. In your opinion, how is WURTA's purpose best served long term? (Choose one)

- a. By participating in a broad coalition of independent transit related groups: _____
 - b. By being highly focused on fixed route, paratransit and shared ride taxi only: _____
 - c. Have fewer transit related groups by bringing as many as possible into an expanded WURTA: _____
 - d. Other (Please describe): _____
- Comment: _____

14. With regard to the role of transit product and services vendors in WURTA, please rate the following:

- a. Opportunity to learn about the latest products and services: _____
 - b. Opportunity to develop relationships that benefit my agency: _____
 - c. Support of WURTA by vendors: _____
 - d. Learn about process or product improvements and best practices from vendors: _____
 - e. Overall importance of recruiting and retaining vendor members: _____
- Comment: _____

15. With regard to WURTA's **State of Wisconsin** legislative activities, please rate the following on a scale of one to ten with ten being the best and one being the worst:

- a. Legislators' knowledge of WURTA's position on key transit issues other than funding: _____
- b. Legislators' knowledge of WURTA's position on state funding: _____
- c. Effectiveness of WURTA's legislative communications efforts that keep state legislators informed about all transit issues including funding: _____
- d. Overall effectiveness of WURTA's legislative relations at the state level: _____

16. With regard to WURTA's **federal** legislative activities, please rate the following on a scale of one to ten with ten being the best and one being the worst:

- a. Legislators' knowledge of WURTA's position on key transit issues other than funding: _____
- b. Legislators' knowledge of WURTA's position on federal funding: _____
- c. Effectiveness of WURTA's legislative communications efforts that keep federal legislators informed about all transit issues including funding: _____
- d. Overall effectiveness of WURTA's legislative relations at the federal level: _____

17. From the following list, please choose three actions that could improve WURTA's legislative effectiveness (Pick three only):
- a. Hire more lobbyists: _____
 - b. Spend more association funds on legislative work: _____
 - c. Have efforts be more focused on fewer things: _____
 - d. Hire a lobbyist with different skills: _____
 - e. Hire a lobbyist full time: _____
 - f. Improve communications to legislators using new media channels such as LinkedIn, Facebook, Twitter, etc.: _____
 - g. Improve member training on speaking to legislators: _____
 - h. Nothing: _____
 - i. Other (please describe): _____
Comment: _____

18. In thinking about the next five years, please name three **future** accomplishments that would define WURTA's success during that period:
- a. _____
 - b. _____
 - c. _____

Addendum C: Survey Results Summary

Background

During the early part of July 2014, over 85 WURTA members were requested to respond to a survey using an on-line service called Survey Monkey. The survey consisted of 18 questions, all of which allowed for multiple choices, and most allowed respondent comments. At the close of the survey there were 35 respondents, representing a very good response rate of just over 40 percent or twice what is usually expected. Nearly all the respondents completed all the questions which also represents an above average response rate.

The survey itself was developed as a way to test and quantify issues surfaced during a focus group comprised of the WURTA Strategic Planning Committee held on June 18 in Madison. These issues covered a number of areas, but all were considered indicative of the attributes that would contribute to the organization's future success. The survey results which are summarized below are to be presented initially to members who have signed up for a one day planning session on July 30, and may be circulated to all members as WURTA leadership deems appropriate.

Please note that when reading the results, all percentages were rounded up or down to the nearest whole number. Questions that call for multiple choices will always add up to more than 100%, and because rounding, questions requiring only one answer could be 1-2% below or above 100%

Results

Q1: What are the most important reasons for WURTA to exist (respondent were allowed three choices from a list of nine reasons)? The results are as follows:

- Lobbying 77%
- Share Knowledge 62%
- Broad Coalition 51%
- Consultative Value 46%
- Relationship Building 37%
- All others (4) 14% or less

Q2: Which of these is most important (only one response allowed from same choices as Q1)? The results are as follows:

- Lobbying 49%
- Share Knowledge 17%
- Broad Coalition 11%

- Relationship Building 11%
- All others (5) 6% or less (Totaling about 13%)

Note: No votes were recorded on two items; future focus and vendor contact.

Q3: What are the most important reasons for your organization to belong to WURTA (Three choices were allowed from a list of seven offered)? The results are as follows:

- Share Knowledge 80%
- Legislative Advocacy 74%
- Working Together(i.e. strength) 66%
- Credibility with elected officials 31%
- All other (3) 14% or less

Analysis: Through this series of three questions, respondents looked at the overall value proposition of the organization. The response clearly indicate, that while there are many things/actions WURTA can engage in, members identified three distinct issues make up the core value of the organization:

- Lobbying/Legislative Advocacy
- Sharing of knowledge
- Coalition/Strength in working together and with organizations of similar interest.

Note: One of the comments relating to lobbying suggested members get formal training to be more effective when talking to legislators.

Q4. Name three weaknesses that make WURTA less effective (Three choices were allowed from a list of 12 offered)?

- WURTA members need to participate more 46%
- Legislative effectiveness 34%
- External communications aren't effective or consistent 31%
- Internal communications aren't effective or consistent 29%
- Member dues/conference revenues are not enough to do what is needed 26%
- Collaboration with too few organizations 20%
- Collaboration with too many organizations 17%
- Too many issues are being worked on at once 14%
- WURTA needs stronger leadership 14%
- Collaboration with the wrong organizations 11%
- Not enough or not the right mix of vendors are represented 9%
- The organization takes up too much of my time 0%

Analysis: By a far margin, there is a feeling that member participation is a weakness, or restated, more member participation would make the organization stronger. No surprise is that legislative effectiveness is mentioned since its value is well established from the earlier questions. There is certainly a strong split of opinions as to whether WURTA's collaborative efforts are correctly directed with half of all total respondents to

this question commenting on coalition issues. Keep in mind however that in the previous three questions, coalition efforts are an important part of the organization's direction. Similarly both internal and external communications when taken together or separately are deemed weaknesses.

Q5: Choose three items that would make WURTA more effective over the next five years (Three choices were allowed from a list of 10 offered)?

- Improve opportunities to learn and exchange information 54%
- Expand WURTA's efforts to partner with other organizations 49%
- Improved communications focused on issues 46%
- Changes in the amount of time spent, skill set or focus of lobbyist 31%
- Fully integrate small transit related organizations into WURTA 29%
- Increase dues and/or membership to do association business 23%
- Change the way WURTA is organized 20%
- Focus WURTA efforts on fixed route, paratransit and SRT ops only 20%
- Being more selective in the organizations WURTA partners with 6%
- Revise the committee structure 6%

Analysis: It is apparent that communications issues that are often mentioned in the previous question about weaknesses are also cited as highly desirable improvements. The exchange of information (share knowledge) was highly valued in Q1 and Q2, and respondents to this question feel that WURTA could improve in this area as well. Only one in five respondents thought WURTA needed to make changes in its organizational structure while even fewer thought its committee structure needed changing (Please see Q 7-11 for insight on this issue). One comment regarding partnering suggested more partnering with 1000 friends and WisPIRG as a way to develop more supportive data on transit issues.

Q6: Rate WURTA's conference effectiveness on a scale of one to ten with ten being the best.

Analysis: The average effectiveness rating was 7.0 with 30 of the 35 respondents providing a rating as asked. There is a notable cluster of responses in the range of 7 to 9 with 23 of the 35 respondents scoring there. In perspective, this is a good score with some room for improvement. So circling back to knowledge sharing and communications and coalition issues as themes or topics are likely areas to induce improvements here in the future.

Q7 through Q11: Committee Effectiveness and Related Issues

Analysis: For the sake of continuity, these four questions are being taken together to provide the best insights from the results.

In **Q7**, respondents were asked to rate the effectiveness of WURTA's committees as follows: "*WURTA attempts to engage members at the committee level by providing opportunities to exchange ideas, discuss issues of mutual interest and solve common problems. Please rate WURTA's committee effectiveness on a scale of one to ten with ten being the best and one being the worst.*" The average rating was 7.4 with 32 of the 35 respondents submitting a rating. Overall, it seems the committees are highly regarded by the respondents.

The next four questions (Q8-11) were also focused on aspects of the committee experience.

In **Q8**, 20 of the 34 respondents indicated that they participate in a committee other than WURTA's Board of Directors. Those that participate were asked to answer Q9 and if they were not participating to skip to Q10.

In **Q9** respondents were asked to rate (on a one to ten/ten best scale) various aspects of their committee experience as summarized by the following average scores:

• Frequency of committee meetings	7.9
• Format of committee meetings	8.0
• Content of committee meetings	7.6
• Opportunity to exchange ideas	8.5
• Productivity of committees	7.7
• Overall satisfaction with committees	8.1

There appears to be a very high level of satisfaction in all aspects of WURTA's committees.

In **Q10** respondents were asked if WURTA has the right number of committees, and those responses are summarized below:

• There are too many committees?	9%
• Not enough committees?	3%
• Has the appropriate number of committees?	49%
• Don't know or have no opinion.	40%

The number of committees seems "just right" and is probably coupled with the high level of participant satisfaction.

This leads to **Q11**, the final committee related question which asks: *Is there a committee(s) that you would suggest be created, eliminated or combined?* Of the 33 responses 21% said yes with 79% saying no. Of the seven respondent comments made on this question, five commented that either the Ops/Safety and Paratransit committees be combined or continue to meet jointly, one suggested that the Legislative

committee being rolled into the Executive committee (which is really the board of directors), and one suggested that an IT/Technology committee be established.

In summary, the committee area is one that few if any changes are needed and this analysis also is consistent with earlier responses in Q4 and Q5.

Q12 and 13: These questions have to do with WURTA's coalition and collaboration efforts with transit related groups. Q12 asked the respondents to rate certain aspects of these relationships (on a scale of one to ten with ten being best). While all 35 respondents replied to this question there were about 40% who responded "Don't Know". These aspects are listed below with the average ratings:

- Cooperation and collaboration 7.1 (15 DN)
- Common interests 7.2 (13 DN)
- Advancement of transit support and funding 7.5 (13 DN)
- Idea exchange 7.0 (13 DN)
- Overall need for a broad coalition 7.5 (13 DN)

The high percentage of DN's is likely to indicate that WURTA members are not seeing the value of the coalition, not because it's a bad value, but because they are not as informed about it as those who actually rated these aspect. The raters are very high on the coalition concept. One of the comments concluded: It may make more sense for the smaller groups to combine and form a larger group so that there are few groups within the overall coalition."

With regard to the future relationships with coalition partners, **Q13** asked how WURTA would be better off long term. Respondents (34) could choose only one of three response and these are the results:

- By participating in a broad coalition of independent transit related groups 47%
- By being highly focused on fixed route, paratransit and SR taxi only 38%
- Have fewer groups by bringing as many as possible into WURTA 15%

Q14: This question covered the role of vendors in WURTA by rating aspects of member/vendor relationships. On a scale of one to ten with ten best these aspects achieved average ratings as follows:

- Opportunity to learn about products and services 6.9 (4 DN)
- Opportunity to develop relationships 7.2 (4 DN)
- Support of WURTA by vendor members 7.2 (6 DN)
- Ability to learn about best practices and procedures 7.2 (3 DN)
- Overall importance of vendors 7.8 (3 DN)

Analysis: WURTA's vendor members are valued for their support, the knowledge they bring and for their overall importance. These ratings and the few DN's suggest that WURTA needs to continue efforts to recruit and engage vendor member, not just for

their support through dues, etc., but because they bring and share knowledge which is an important part of the overall WURTA value.

(Note: Vendors were not included in the survey, so the above results reflect system member attitudes and opinions only.)

Q15: This question asked respondents to rate WURTA's legislative effort at the state level on four general categories. The rating scale was from one to ten with ten being the best. The average rating results are as follows:

- Legislators knowledge of state transit issues other than funding 7.2 (6 DN)
- Legislators knowledge of state transit funding issues 7.7 (6 DN)
- Effectiveness of communications efforts directed to state legislators 7.2 (6 DN)
- Overall effectiveness of legislative efforts at the state level 7.2 (6 DN)

Analysis: It is obvious that much of WURTA's legislative efforts have focused on funding and legislators have picked up on the information related to funding. The overall rating of 7.2 is quite good, and two of the comments are worth repeating. The first is that members need to be more active in legislative work and the second suggested that there be a focus on fewer issues.

Q16: Like the previous question, this one asked respondents to rate WURTA's legislative efforts at the federal level on the identical categories. The rating scale was one to ten with ten being the best. The average rating results are as follows:

- Legislators knowledge of state transit issues other than funding 7.3 (9 DN)
- Legislators knowledge of state transit funding issues 7.0 (8 DN)
- Effectiveness of communications efforts to state legislators 6.6 (8 DN)
- Overall effectiveness of legislative efforts at the state level 7.1 (8 DN)

Analysis: These ratings mirror the state ratings although slightly lower. Over ratings are nearly identical, but fewer respondents did the ratings as shown by the DN numbers. It is a bit of an anomaly to see the communications ratings be the lowest here of all ratings in the two groups. The increased DN's and low communications rating may reflect less knowledge of the members regarding this aspect of the association's legislative efforts.

Q17: As a follow up to the effectiveness of legislative questions, respondents were asked what actions could be taken to improve legislative effectiveness. Respondents could choose as many as three actions from a list of eight (two respondents did not participate in this question). The results are shown as follows:

- Improve member training on speaking to legislators 70%
- Improve communications to legislators using new media channels 42%
- Spend more association funds on legislative work 39%
- Hire a lobbyist full time 36%
- Have efforts be more focused on fewer things 24%

- Hire a lobbyist with different skills 15%
- Hire more lobbyists 6%
- Nothing 6%

Analysis: The vast majority of respondents want to see more training on how to speak to legislators. Nearly an equal number of responses were assigned to each of the next three items: communications, more funding for legislative work and hiring a full time lobbyist. While one item stands out, there is certainly a range of preferences as to what can be done to be more effective. Within the comments, one respondent put the new media communications and “good old fashioned lobbying” together as a way to improve legislative effectiveness.

Q18: The final question challenged respondents to think into the future and to express three accomplishments that would define WURTA’s success in five years. This was the only open ended question in the survey and no priority order was requested. Twenty three of the 35 respondents participated in this question with most giving three accomplishments, but all giving at least one. Please see below for a complete breakdown of the responses.

Analysis: It is not surprising that transit funding accomplishments were cited the most followed fairly closely by organizational changes. Lobbying, RTA’s and education were all about equally cited issues. Within funding increases in state operating funding, obtaining capital assistance and increased federal funding all had multiple responses. RTS’s were mentioned seven times. Hiring an executive director who can lobby lead all organizational accomplishments with four mentions followed by developing the next generation of WURTA leaders getting three mentions.

Summary of Q18 Responses

Three Accomplishments that Would Define WURTA’s Success

- Transit Funding (total- 19)
 - Restore/Increase State funding (5)
 - Restore/Obtain Capital funding (4)
 - Increase Federal Funding (4)
 - Dedicated State funding for transit operations (3)
 - Solidify funding
 - 80% of members would have the funds to expand routes
 - The establishment of new shared-ride taxi systems in the state
- Organizational Issues (total – 16)
 - Hire an Executive Director/Executive Secretary/Director who Lobbies(4)
 - Establish formal IRS status
 - Transition partners to WURTA
 - Development of next generation of WURTA leaders(3)
 - Better internal communication(3) /communicate w/new technologies (1)
 - More efficient, concise meetings

- Member satisfaction improvements
 - Continue efforts to strengthen and expand coalition(4)
- Lobbying (total – 8)
 - Establishing effective legislative relations – State, Federal, staff
 - More lobbying (3)
 - WURTA – a household name to legislators
 - WURTA – a go to organizations for Federal and State issues
 - Interests actively promoted year-round
 - More lobbying success
- Establishment of RTA's statewide or in selected communities (7)
- Public Education (total – 6)
 - Increased public support for transit
 - WURTA – a one-stop shop for transit materials
 - More effective external communication
 - Recognition that everyone pays into the transportation fund even if they don't drive
 - Recognition that the extreme growth in vehicle miles of travel is over
 - Recognition that the number of people who do not, cannot or prefer not to drive is increasing
- Member training (total – 2)
 - Train system managers to talk to legislators
 - Bring more collaborative training opportunities to the State
- Specific Issues (total – 4)
 - Legislation for higher SMV rates
 - Pass State requirement for wheelchair accessible taxis
 - Grant writing capital funding raised
 - More involvement of local officials

Addendum D: Strategic Planning and Visioning Day Exercise July 30, 2014

Directions: It is 2019 and the American Public Transit Association (APTA) will be issuing an award for the “Most Improved and Outstanding State Transit Association.” You think WURTA should receive this award and you are creating an outline to highlight all the great things that the organization has done over that last five years so you can fill out the nomination form:

2019 APTA Most Improved and Outstanding State Association Award Nomination Form:

The Wisconsin Urban and Rural Transit Association deserves this award because in the last five years it has recorded the following accomplishments:

- A. Because of the vision we pursued, our membership recruitment and retention has improved, our member participation has increased and we have developed effective leadership due to the following changes and actions:
- B. Our organizational structure is more effective because of the following actions.
- C. To be more effective in our government relations/lobbying, we made the following changes:
- D. Because of those changes, we have accomplished the following legislative initiatives (both state and federal):
- E. Our external and internal communications were changed to be more effective in the following manner:
- F. As an organization, we are stable financially and have all the financial resources we need because of the following actions:
- G. Our members are more effective transit professionals because we have placed a high value on sharing knowledge and experience as illustrated by the following actions:
- H. Within WURTA we have better defined our relationship with other state transit related and/or supportive organizations by taking the following actions:

Addendum E: WURTA Strategic Planning and Visioning Day Results July 30, 2014

WURTA – Five Years in the Future

Membership		
Votes – 1st	Votes – 2nd	Action/ Changes
5	4	Mentors for new members
2	X	Ongoing education on value of WURTA membership
7	9	Encourage transit systems to have more staff participate
0	X	Empower next generation of leaders to be more involved
1	X	Set standards for WURTA members
10	X	Hire FT lobbyist/administrator for better communications and training (Combined w/similar action below for 2 nd vote, see “*” below)
3	X	Training tool for new members
2	X	Identify and recruit new members
3	X	Set goals and measure results
4	2	Improve communications among members
4	1	Accept more members and member types & stakeholders
0	X	Most effective in stated areas to be an “attractive” org.
0	X	State minimum participation level for members
4	X	Expand staff capability to include PR (Combines with similar action on second vote, see “*” below)
7	10	Get non-traditional groups to join WURTA by helping them see the value of transit
0	X	Provide financial incentive to bring in new members
9	13	*Hire FT Exec. Dir./Lobbyist/Administrator with PR and Communications skills (Combined from above for 2 nd vote.
4	0	Find funding for projects that serve members

Organizational Structure		
Votes – 1st	Votes – 2nd	Action/ Changes
0	X	Consolidate and define leadership of the organization
1	X	Well defined sub (standing) committees
1	X	Define/simplify structure and pursue 501c4 status
4	4	Include partner organizations in WURTA
9	7	Define tax exempt status
5	2	Establish WURTA as the go to org for transit data and info
0	X	Smaller committees and fewer board members
11	8	Solidify partnerships w/essential transportation and non-transportation orgs
0	X	Focus committees on “sub areas” of transit orgs
10	7	Hire an executive director
2	X	Clearly defined relationship w/partner orgs
1	X	Create officer progression/succession
2	X	Allow non-transit members to have vote
7	2	Implement communications that allow remote participation
0	X	More general membership meetings
12	9	Establish an org. structure that supports WURTA goals

Lobbying/Governmental Relations		
Votes – 1st	Votes – 2nd	Action/ Changes
7	4	Invest more money into lobbying
2	X	Use grants to increase lobbying
10	1	Combine lobbying efforts w/other orgs (Road Builders)
2	X	Develop teams to educate legislators
2	X	Mentoring on lobby days
2	X	More regular contact w/legislators outside of lobby days
2	X	Focus lobbying on transit’s economic benefits
1	X	Add social media to modernize lobbying
9	9	Encourage more groups including nontraditional ones like bikes, business, education, millennials, conservatives and other not currently members
9	6	More time w/local grass roots groups
10	8	Member training on communicating and lobbying with legislators
7	11	Tax status that allows WURTA to lobby and accept donations
2	X	Put a face on our customers

Legislative Accomplishments		
Votes – 1st	Votes – 2nd	Action/ Changes
0	X	Face to face meetings w/legislators
4	X	State capital dollars
15	12	Transit funding stays in Transportation Fund
1	X	Milwaukee has dedicated funding
9	6	Federal capital dollars increased
1	X	Streamlines federal regulations
0	X	Better understanding of transit issues by Federal legislators
9	11	Statewide RTA enabling legislation
1	X	High speed rail
8	5	35% guaranteed state ops funding w/RTA's getting 40%
0	X	Gas tax rebated kept
5	1	Bi-partisan support gained
11	7	Secure long term transit funding
0	X	Multi-modal operations across the state
1	X	Required accessibility for taxis and shared cars

Communications		
Votes – 1st	Votes – 2nd	Action/ Changes
10	12	Establish new technologies – Twitter etc.
2	X	Improved Website including member only section to share information
6	2	Develop a regular schedule of events for members
0	X	Routine visits by Executive Director to a transit systems/transit boards
1	X	Establish regular outreach to “millennials”
6	4	Presentations regularly to non-user groups (Rotary etc.) by Director and transit systems
6	4	Regular e-newsletters on transit issues
0	X	Survey legislators to learn most effective techniques
3	X	WURTA state tour to increase transit awareness
3	X	Document and communicate accomplishments
2	X	Create a WURTA “App”
1	X	Partner to produce as annual Community Viability Conference
10	Combined with new technologies for second vote	Skype “go-to-meetings”
0	X	Bring back newsletter

2	X	Regionalized marketing and communication efforts
9	12	Dedication to regular internal and external communications
1	X	Executive Director is responsible for communications
3	X	Expanded web-based communication exchange – beyond the State
6	9	Develop materials to show value of transit

Financial		
Votes – 1st	Votes – 2nd	Action/ Changes
11	10	Stronger stable funding with regular increases allows us to increase our dues
2	X	Link with other States for conferences
1	X	Partnership with State DOT for WURTA funding
2	X	Partner with organizations to get grants
7	0	More non-transit members
9	4	Applied for and received key grants
9	11	Defined tax exempt status
9	7	Marketing increased membership and community support
9	7	Recruit more vendors and engage them more
1	X	Benchmark WURTA duties and dues to transit associations in progressive states
4	X	Create an endowment through donations

Sharing Knowledge		
Votes – 1st	Votes – 2nd	Action/ Changes
2	X	Officially acknowledging excellence – recognition/awards
2	X	Web based peep-to-peer sharing options by specialty
0	X	Quarterly conference call for sharing
1	X	More electronic meetings to meet more often
11	12	Mentor program
9	8	Document sharing/library
2	X	Paid website manager
3	X	Specialists and expert speakers at meetings
3	X	Broad sharing of committee minutes
0	X	Retirees to serve as resources to new people
8	10	Annual leadership training conference for members
1	X	Training and education scholarships
3	X	Scholarship for Leadership APTA
1	X	Best practices tour to study different areas

8	5	Peer to peer network on specific topics
7	3	Specific “tracks” of training
1	X	Partner with educational institutions for training development
1	X	In-person regional round tables
3	X	Certified training at annual conference

Relationships		
Votes – 1st	Votes – 2nd	Action/ Changes
0	X	Recognition by others that makes us the best association
1	X	Adopt other member categories for WURTA with scaled dues
1	X	Outreach and listening sessions
7	10	Broaden base of membership to include non-transit members
0	X	Focus on ALL areas of the State and all system sizes
7	5	Form a broad coalition of related groups
2	X	Annual idea day with Google and other idea groups to see how transit can serve them
0	X	Encourage members to disperse at multi-state conferences
2	X	WURTA to host an annual visioning event and include other organizations in defining our objectives
8	4	Member training for effective coalition building
3	X	Share knowledge and resources with other organizations to make them more effective
5	1	Have WURTA members participate in related organizations
10	6	Define a shared and unified message among partners
4	X	Educate WURTA members about partner organizations
3	X	Invite other organizations to WURTA meetings for better understanding
1	X	Offer other organizations conference planning, lobbying education, non-voting board of director status and defined access to lobbyist and Executive Director
11	12	Encourage WURTA members to take a leadership role in regional coordination

Addendum F:

Tax-Exempt Status Review

Background

Over the past years, WURTA has discussed the possibility of applying for Internal Revenue Code (IRC) 501(c) 3 status for the organization. It was felt that this would be beneficial for the organization for a number of reasons. 501(c)(3) organizations are exempt from Federal taxes. They are also exempt from state taxes in most states. This is true of all organizations classified under chapter 501(c), not just those that are 501(c)(3). Unlike other 501 (c) organizations, however, contributions made to 501(c)(3) organizations are tax-deductible for the donors. Moreover, many foundations and other organizations that issue grants for special purposes require the recipients of those funds be 501(c)(3) or (4) organizations. 501(c)(3) is generally preferable. Many non-profit, educational based organizations, like WURTA, use grants to fund their activities and further their mission.

The purpose of this document is to present the parameters of the requirements for the establishment of formal IRC tax-exempt status for discussion purposes. It does purport to give legal or financial advice. WURTA is strongly encourage to engage the services of a tax accountant or tax attorney before proceeding with further actions in this area.

Exemption Requirements - 501(c)(3) Organizations

The IRS website at [http://www.irs.gov/Charities-&-Non-Profits/Charitable-Organizations/Exemption-Requirements-Section-501\(c\)\(3\)-Organizations](http://www.irs.gov/Charities-&-Non-Profits/Charitable-Organizations/Exemption-Requirements-Section-501(c)(3)-Organizations) provides extensive information about tax-exempt status and the parameters of 501(c)(3) organizations. IRS Publication 557 (10/2013), "Tax-Exempt Status for Your Organization" also provides comprehensive information on this subject.

Discussion of WURTA in Relation to the 501(c)(3) Requirements

Purpose

Under 501(c)3 an organization's purpose must be charitable, religious, educational, scientific, literary, testing for public safety, fostering national or international amateur sports competition, and preventing cruelty to children or animals. The term *charitable* is used in its generally accepted legal sense and includes relief of the poor, the distressed, or the underprivileged; advancement of religion; advancement of education or science; erecting or maintaining public buildings, monuments, or works; lessening the burdens of government; lessening neighborhood tensions; eliminating prejudice and discrimination; defending human and civil rights secured by law; and combating community deterioration and juvenile delinquency.

WURTA can certainly claim that one of its main purposes is educational. It provides education to its members. It also educates the general public and the political leaders about public transportation, its purpose and its benefits to the community. It also provides education about political issues which impact public transportation and its ability to perform its mission in the community. While claiming that it is “charitable” might be a stretch, it does advocate for the poor/underprivileged who depend upon transit service.

Political Activities

All section 501(c)(3) organizations are absolutely prohibited from directly or indirectly participating in, or intervening in, any political campaign on behalf of (or in opposition to) any candidate for elective public office. Contributions to political campaign funds or public statements of position (verbal or written) made on behalf of the organization in favor of or in opposition to any candidate for public office clearly violate the prohibition against political campaign activity. From the information provided by WURTA, appears that WURTA does not participate in any of the above referenced activities.

Lobbying

This is definitely a gray area, both in terms of the regulations themselves and in relation to WURTA’s activities.

The regulations state that no organization may qualify for section 501(c)(3) status if a substantial part of its activities is attempting to influence legislation. A 501(c)(3) organization may engage in some lobbying, but too much lobbying activity risks loss of tax-exempt status. The regulations further state that an organization will be regarded as attempting to influence legislation if it contacts, or urges the public to contact, members or employees of a legislative body for the purpose of proposing, supporting, or opposing legislation, or if the organization advocates the adoption or rejection of legislation.

This position is blurred by the following statements: “Organizations may, however, involve themselves in issues of public policy without the activity being considered as lobbying. For example, organizations may conduct educational meetings, prepare and distribute educational materials, or otherwise consider public policy issues in an educational manner without jeopardizing their tax-exempt status.” The line between “influencing legislation” and “involving themselves in the issues of public policy” is not exactly clear.

WURTA certainly provides education. They also “involve themselves in the issues of public policy”. WURTA has also worked to influence legislation (lobbying). How much of its activity falls on each side of that line is unclear. Certainly, in the instances where it has worked with the legislature to introduce legislation and where it has directly asked legislators to support certain legislation, WURTA is lobbying.

501c3 organizations are not totally prohibited from lobbying, however, lobbying may not be a major part of its activities. The IRS uses the “substantial parts” test to determine how much lobbying is acceptable. Basically, this says that a “substantial part” of an organization’s activities may not be involved in lobbying. According to the IRS, this is measured in the following way: “The IRS considers a variety of factors, including the **time** devoted (by both compensated and volunteer workers) and the **expenditures** devoted by the organization to the activity, when determining whether the lobbying activity is substantial.” That determination is made on a case by case basis.

If an organization wants, it can ask the IRS to use “the expenditure test” as an alternate means of determining if an organization is staying within acceptable limits with its lobbying activities. For an organization with limited expenditures (under \$500,000 in total annual expenses), the organization may not spend more than 20% of its total budget on lobbying activities. The organization must actively request that this is the test that will be used by filing Form 5768. If it does not file this form the “substantial part” test, as described above, will be used.

WURTA’s overall expenditures were just over \$138,000 in 2013. Fees paid directly to Mr. Goyke totaled \$57,000. The financial statements also list approximately \$25,000 in “Lobbying and Association Expenses.” It is unclear exactly how much of these expenses are associated with lobbying. In general, the relative level of these three categories of expenses appears to be fairly consistent over the last several years.

If WURTA were to pursue tax-exempt status under 501(c)(3) the expenditures listed under “Lobbying and Association Expenses” would need to be separated and clarified. It would also have to clarify and document how much of Mr. Goyke’s time is being spent on activities that are not considered related to lobbying (i.e. Conference planning and organizing; organization administrative duties etc.) If the organization elected to use the “expenditure test” the total of these lobbying expenses would have to be less than 20% of the total expenses or approximately \$27,000.

Establishment of this classification may make more sense if the organization decides to hire an Executive Director. At the current time, there are few organizational resources available for applying for and executing external grants....one of the primary reasons WURTA is interested in the 501(c)(3) designation. An Executive Director would potentially be able to do this, as well as initiating other informational and educational projects for the organization. Adding these activities and the expense of a Director would shift the balance of organizational expenditures away from lobbying.

Other Organizational Options

There are many other types of tax-exempt organizations that are not organized under 501(c)(3). While these organizations do not pay taxes, contributions to these organizations, generally, do not provide a tax deduction for the donors. Since WUTA receives few, if any, contributions, this may not be an issue.

The Attachment A provides a comprehensive overview of the other tax-exempt classifications. It appears that 501(c)(4) or 501(c)(6) might be alternative classifications that WURTA could consider. These are discussed below.

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501(c)(4) Classification

Types of Organizations Exempt under Section 501(c)(4)

Internal Revenue Code section 501(c)(4) provides for the exemption of two very different types of organizations with their own distinct qualification requirements. They are:

- Social welfare organizations: Civic leagues or organizations not organized for profit but operated exclusively for the promotion of social welfare, and
- Local associations of employees, the membership of which is limited to the employees of designated person(s) in a particular municipality, and the net earnings of which are devoted exclusively for the promotion of social welfare.

Social Welfare Organizations

To be tax-exempt as a social welfare organization described in Internal Revenue Code (IRC) section 501(c)(4), an organization must not be organized for profit and must be operated exclusively to promote social welfare. The earnings of a section 501(c)(4) organization may not inure to the benefit of any private shareholder or individual.

Lobbying and Political Activities

Seeking legislation germane to the organization's programs is a permissible means of attaining social welfare purposes. Thus, a section 501(c)(4) social welfare organization may further its exempt purposes through lobbying as its primary activity without jeopardizing its exempt status. An organization that has lost its section 501(c)(3) status due to substantial attempts to influence legislation may not thereafter qualify as a section 501(c)(4) organization. In addition, a section 501(c)(4) organization that engages in lobbying may be required to either provide notice to its members regarding the percentage of dues paid that are applicable to lobbying activities or pay a proxy tax. The promotion of social welfare does not include direct or indirect participation or intervention in political campaigns on behalf of or in opposition to any candidate for public office. However, a section 501(c)(4) social welfare organization may engage in some political activities, so long as that is not its primary activity. However, any expenditure it makes for political activities may be subject to tax under section 527(f).

Classification of WURTA as a 501(c)(4) Organization

It appears that WURTA could easily make the case that it would qualify as a 501(c)(4) organization. Promoting public transportation and the funding of public transportation

are social welfare issues. In addition, under this classification, its lobbying activities are not restricted as long as they relate to the organization's social welfare purpose.

Many large 501(c)(3) organizations also have a related 501(c)(4) organization. This allows tax-exempt contributions to the 501(c)(3) organization, while handling lobbying activities through its 501(c)(4) arm. This approach requires a strict delineation between the activities and expenses of the organizations. Given the fact that WURTA is not really worried about contributions being tax exempt, it may be more complicated than necessary for the organization.

501(c)(6) Classification

Business Leagues

Section 501(c)(6) of the Internal Revenue Code provides for the exemption of business leagues, chambers of commerce, real estate boards, boards of trade and professional football leagues, which are not organized for profit and no part of the net earnings of which inures to the benefit of any private shareholder or individual.

A business league is an association of persons having some common business interest, the purpose of which is to promote such common interest and not to engage in a regular business of a kind ordinarily carried on for profit. Trade associations and professional associations are business leagues. To be exempt, a business league's activities must be devoted to improving business conditions of one or more lines of business as distinguished from performing particular services for individual persons. No part of a business league's net earnings may inure to the benefit of any private shareholder or individual and it may not be organized for profit to engage in an activity ordinarily carried on for profit (even if the business is operated on a cooperative basis or produces only enough income to be self-sustaining). The term *line of business* generally refers either to an entire industry or to all components of an industry within a geographic area. It does not include a group composed of businesses that market a particular brand within an industry.

501(c)(6) organizations may engage in unlimited amounts of lobbying. 501(c)(6) organizations may engage in political campaigns on behalf of or in opposition to candidates for public office provided that such intervention does not constitute the organization's primary activity.

Classification of WURTA as a 501(c)(6)

WURTA could certainly make a good case that it would qualify as a 501(c)(6) organization.

Moving Forward

The consulting team has been unable to determine the exact nature of the organization's current tax exempt status. Neither the current nor previous Treasurers know under what basis WURTA's tax-exempt status exists. Nor are there any documents available in the files of the organization that indicate its Internal Revenue Code (IRC) classification. It appears that the organization never formally applied for Federal tax-exempt status, but it also appears that a formal application is not required, except in certain cases. (i.e. request of designation as 501(c)(3) or 501(c)(4).)

Moreover, the Wisconsin Department of Financial Institutions has no record of WUTA or WURTA either as a corporation or a charitable organization. It is possible that WUTA was registered as an association in Dane County under Chapter 184, however, the consultants were unable to find records confirming this.

In 2000, the organization did apply for and receive a Federal Employer Identification Number (EIN). A copy of the application for that number is held by the current Treasurer of the organization. It lists the organization as "Other – non-profit – statewide association."

If the organization wishes to pursue 501(C)(3)/(4)/(6) status it will be required to submit to the IRS organizing documents that state the organization's purpose. It will also be required to show that it is a trust, corporation or association legally established under the laws of the state of Wisconsin. Hence, this issue will need to be resolved before moving forward.

It is strongly recommended that the organization consult an attorney that works with these issues before proceeding with this process, to ensure that the organization has documents to show that it is established (or re-established) properly. According to the Wisconsin Non-Profits Association (WNA) the State Bar of Wisconsin offers free referrals, to Wisconsin lawyers, for nonprofits who have the ability to hire an attorney to address their legal issues. Attorneys referred through this service agree to charge a reduced rate for the initial consultation. Additional information is available at <http://www.wisconsinnonprofits.org/HowtoStartaNonprofit> .

Addendum G: Directors and Officers Insurance

Background

The Wisconsin Urban and Rural Transit Association (WURTA) is a not for profit advocacy group representing a broad range of public transportation providers throughout the State of Wisconsin. The organization is about 40 years old and is run by volunteer officers and directors from its member organizations. It has no employees, and obtains various professional services by entering into contracts with individuals and firms. In addition, it regularly enters into contracts for meeting facilities and services normally associated with meetings (e.g. food, AV equipment, etc.). It also has no physical assets, nor does it rent or otherwise maintain office space or equipment.

Recently, WURTA has initiated a strategic planning process to help map out its future both in an action and organizational sense. As part of the process, WURTA is asking if its officers and directors need to have insurance coverage typically associated with those positions and responsibilities. Therefore the purpose of this report is to explain the issue of director and officer insurance and make a recommendation about further steps associated with this type of coverage.

What Is Director and Officer Insurance?

According to Guidestar, an organization that works with and advocates for not for profits of all types (although it specializes in fund raising organizations), Director and Officer Insurance, or D&O as it is commonly referred to, is *"protection against a breach of duty" by the directors and officers. D&O pays for actual or alleged wrong decisions, what the policy calls "wrongful acts."* Although each insurer defines coverage in its own way, D&O insurance generally includes any actual or alleged act or omission, error, misstatement, misleading statement, neglect or breach of duty by an Insured person in the discharge of his/her duties."

Because WURTA has no employees or physical assets, one may conclude that the need for coverage of this type may not be worth the cost. However, there are a wide range of D&O coverage options that may be relevant.

In General, Why Is D&O Coverage Needed?

The Travelers Insurance Company cites the following five general reasons that not-for-profits should have D&O coverage:

1. The protections afforded by the Volunteer Protection Act are limited and don't fully protect the directors or officers of nonprofits who may be on the receiving

end of a lawsuit. The Act does not provide for the cost of defense, nor does it apply to harm caused by gross negligence or reckless misconduct.

2. Anyone involved in the management of a nonprofit organization — including directors, officers, employees and volunteers — could be held personally liable for errors or omissions involved in the management of the organization.
3. Being on the receiving end of a lawsuit can put a director's or officer's reputation and finances on the line and also threaten your organization's ability to continue serving its mission. Legal fees and damages resulting from nonprofit directors and officer claims often exceed the organization's liquid net assets, which may prevent the organization from indemnifying directors and officers.
4. Nonprofit organizations and their directors and officers can be sued for a range of issues including fiduciary duty breaches, failure to fulfill the organization's nonprofit mission, misuse of donor-restricted funds, or improper conduct of volunteers or employees. These suits can jeopardize your organization's mission and existence.
5. Nonprofit organizations may be more at risk of litigation than for-profit companies, as 63 percent of not for profit organizations reported a D&O claim within the past 10 years compared to 27 percent for private companies.

As discussed in the points above, even a small law suit or claim against WURTA could be of a value that exceeds the organization's financial resources. WURTA officers and directors *need* to check to see if their member agencies would defend them if a suit arose in which they were named. Other research and reading indicated that many companies no longer allow employees to serve as officers or board members unless the organization served has D&O insurance. So even though their employer sanctions participation, that sanction may not and should not be interpreted as a protection. In addition, point "2" above refers to WURTA officers and board members potentially being personally liable. Personal liability insurance does not cover a person who is an officer or director should a claim be made against WURTA.

Finally, it is important to remember one of the main purposes of insurance: the transfer of risk from the person to the insurance coverage. This transfer is in every form of insurance from life to liability, and from homeowner's to health care.

What Types of Coverage Options Are There With D&O Insurance?

In brief, many, however not all might apply or be appropriate for WURTA. Like most insurance coverage, it is important to look at the period of coverage, the liability limits, legal defense limits, etc. Also, since WURTA often is the lead organization on events like conferences and Capital legislative rallies, some type of special event coverage may be advantageous to consider.

What is the Process for Determining Appropriate D&O Coverage and How Much Does It Cost?

In order to get the best price outcome, it would be most advantageous to engage an insurance broker who regularly deals with D&O insurance and especially not for profit organizations. While it may be possible, though limited, to obtain D&O insurance directly, insurance brokers have experienced staff who consult with the organization to understand their needs, interpret those needs into a concept for coverage, and then bid the coverage needs out to the insurance marketplace. Generally, one broker uses their knowledge of the insurance industry to find the best price for the coverage; much like a purchasing agent would do for a transit system.

According to one broker representative involved in D&O and interviewed while researching this issue, annual premium costs could range anywhere from \$500 to \$2000, but that was also dependent on such things as policy limits and coverage features.

It is important to note, that in designing the right insurance coverage, brokers (and insurers for that matter) will want to know as much about the organization as possible. They will definitely want to review all formal organizational documents such as constitutions, by laws, tax status documentation, typical contracts, financials, etc., as well as review the number of officers and directors and their roles. It should be noted that typically coverage of \$1 million is usually the minimum recommended starting point.

Recommendation

There are two recommendations that come from the above analysis:

- 1. After weighing the risks, both personally and organizationally, of continuing to operate without D&O insurance, WURTA's officers and directors need to seriously consider taking out a D&O insurance policy.**
- 2. WURTA should seek out an insurance professional with D&O expertise as well as experience in dealing with not for profits particularly those analogous to WURTA. In order to do this, WURTA should obtain two or three insurance broker recommendations.** This is needed because this report does not attempt to represent the complete "story" about D&O insurance, which may only be available by having a thorough D&O insurance evaluation made by a qualified professional.

Addendum H: Organizational Structure and Partner Organizations

Background

The Wisconsin Urban and Rural Transit Association has worked collaboratively with a number of other transportation organizations over the years. These organizations have shared information and collaborated on events to further the effectiveness of all. Most of the other organizations are also represented legislatively by WURTA's Legislative Liaison, Mr. Goyke. Over the last year, these organizations have been exploring the option of aligning more closely, either under an "umbrella" organization, or by formally joining as one organization.

From the focus group exercise and the member survey, conducted as part of the strategic plan process, it became apparent that many of WURTA's members have very little knowledge about these other organizations. There was also confusion over the actual structure of WURTA at the current time.

In order to address these issues, this report provides an overview of WURTA's organizational structure as specified in its constitution (as amended as of 7/9/08). It also provides basic information about WURTA's partner organizations, with the same information for WURTA for comparison purposes.

WURTA Organizational Structure

(as mandated by the Constitution of the Wisconsin Urban and Rural Transit Association as amended as of 9/8/08)

Members

Regular membership shall be made up of Wisconsin municipalities or agencies directly involved in the daily operation of a public transit system. There may be more than one member from each system, but there shall be only one vote per transit system.

There are also four classifications of non-voting members:

- 1) Representative of shared ride taxi systems or others receiving operating assistance under Wis. Statutes 85.20.
- 2) Associate Members – those who are engaged in manufacturing or who are involved in supplying goods or services to any transit agency in Wisconsin.
- 3) Affiliate Members – representatives of any transit publications; individuals and organizations involved in transit planning, funding or oversight at any level of government; individuals and organizations interested in the advancement of public transportation.
- 4) Retiree Members

Officers

Chairperson
Vice-Chairperson
Secretary
Treasurer
Director at large – General Membership
Director at large – General Membership
Director at large- Associate Members
Director at large –Taxi Members

A Nominating Committee, appointed by the Chair recruits, a slate of Officers and Directors to be presented to the membership for election at the Annual Meeting.

Board of Directors

The Board of Directors is made up of all elected officers. Each member shall have one vote with the exception of the Treasurer, the Associate Director and the Taxi Director who shall be non-voting members.

Committees

The Chairperson or a majority of the Board of Directors may appoint a committee at any time. The committee will report to Chair or the Board as appropriate.

Standing Committees

- Operations and Safety
- Maintenance
- Marketing
- Legislative
- Finance
- Paratransit

Members of the Legislative Committee shall be appointed by the Chair and approved by the Board of Directors. Members of all other standing committees shall consist of those members volunteering to participate. The Chairperson of the Legislative Committee shall be appointed by the Chair and approved by the Board of Directors. Chairs of all other standing committees shall be elected by the committee members.

Audit Board

The Board of Directors shall appoint an Audit Board each even numbered year to oversee the finances of the organization. The Audit Board shall consist of three regular members who are not on the Board of Directors.

WURTA and Partner Organizations

Organization Name: **Wisconsin Rural and Paratransit Providers (WRAPP)**
Organization Type: Unknown
Not registered with the Wisconsin Department of Financial Institutions. (DFI). Not registered to lobby in Wisconsin.
Membership: 23
Annual Dues: \$50/agency
\$25/individual
Purpose: An association of specialized transportation providers organized to provide a resource network for all providers in the State of Wisconsin. The goal is to create greater public awareness and community support of rural and specialized transportation programs.
Primary Activities: Annual Roadeo; Spring and Fall Conferences
Leadership: Connie Jacobson

Organization Name: **Wisconsin Association of Mobility Managers (WAMM)**
Organization Type: 501(c)(6)
Registered with Wisconsin Dept. of Financial Institutions as a non-stock corporation. Registered to lobby in Wisconsin with Government Accountability Board (GAB)
Membership: 44
Annual Dues: \$150/association
\$35/individual
Purpose: To lead in coordinated mobility solutions and to support the systems and professionals working in the field. To provide opportunities for professional growth through educational and networking events, ongoing support, and resource sharing.
Primary Activities: Member training and certification; Public education; Advocacy for increased availability, effectiveness, and efficient use of transportation resources.
Leadership: Norah Cashin

Organization Name: **Wisconsin Association of Taxicab Owners (WATO)**
Organization Type: 501(c)(3)
Registered with Wisconsin Dept. of Financial Institutions as a non-stock corporation. Registered to lobby in Wisconsin with Government Accountability Board (GAB)

Membership: 20
Annual Dues: \$100/company +\$8/vehicle
\$105/associate membership
Purpose: Represent taxi cab owners in areas of administrative or legislative policy which affect the ownership, management, and operation of a taxi or shared ride system.
Primary Activities: Lobbying; Some training
Leadership: Richard Running - President

Organization Name: **Specialized Medical Vehicle Association of Wisconsin(SMVAW)**
Organization Type: Unknown
Not registered with DFI. Registered to lobby in Wisconsin with Government Accountability Board (GAB)

Membership: 15
Annual Dues: \$100 - \$300/regular member; \$150/associate member; \$100/vendor
Purpose: An association of specialized medical vehicle providers who focus on transporting those needing assistive devices (such as wheel chairs, scooters and walkers) to medical services.
Primary Activities: Advocacy/Education
Leadership: Jim Brown

Organization Name: **All Aboard Wisconsin**
Organization Type: Applying for 501(c)(3) and 501(c)(4) status
Registered with Wisconsin Dept. of Financial Institutions as a non-stock corporation. Registered to lobby in Wisconsin with Government Accountability Board (GAB)
Membership: 55
Annual Dues: \$25 membership fee – also supported by grants
Purpose: Support expanded modern passenger train service in and through Wisconsin with greater connectivity and cooperation with other transportation systems.
Primary Activities: Education/Alliance Building/Public outreach/Lobbying
Leadership: Michael McCoy – President

Organization Name: **Wisconsin Coordinated Transportation Cooperative (WCTC)**
Organization Type: Unknown

<p>Membership:</p> <p>Annual Dues:</p> <p>Purpose:</p>	<p>Registered with Wisconsin Dept. of Financial Institutions as a stock cooperative. Registered to lobby in Wisconsin with Government Accountability Board (GAB)</p> <p>9</p> <p>The Cooperative is comprised of Wisconsin specialized transportation providers and advocates. The cooperative is dedicated to forming coordinated efforts to improve services for Wisconsin residents who qualify or choose shared rides, taxi's, specialized medical vehicles, common carriers, public transit or any other emerging form of specialized transportation. By professional coordination of these services the Cooperative will find ways to reduce costs and improve options for Wisconsin taxpayers.</p>
<p>Primary Activities:</p> <p>Leadership:</p>	<p>Undetermined at this point.</p> <p>Paul Bittorf - President</p>
<p>Organization Name:</p> <p>Organization Type:</p>	<p>Wisconsin Urban and Rural Transit Association</p> <p>Unknown</p> <p>Not registered with Wisconsin Dept. of Financial Institutions. Registered to lobby in Wisconsin with Government Accountability Board (GAB)</p>
<p>Membership:</p>	<p>Approximately 100 individuals representing 23 voting transit systems; 4 taxicab/rural members; 18 Associate (business) Members; and 7 Affiliate Members</p>
<p>Annual Dues:</p>	<p>Transit Systems: \$550 + \$80/bus</p> <p>Associate Members: \$440</p> <p>Affiliated Members (Rural Providers) \$330</p>
<p>Purpose:</p>	<p>To educate the public about the benefits of public transportation; to provide educational and technical support to individual and organizations that provide public transportation in Wisconsin; to advocate for public transportation.</p>
<p>Primary Activities:</p> <p>Leadership:</p>	<p>Education/Advocacy/Networking/Annual Conference</p> <p>Crystal Martin – Chairperson</p>