

IBTTA STRATEGIC PLAN 2022-2024

Overview And Introduction: Taking Stock Of Where We Are

IBTTA has been engaged in a strategic planning and visioning process for most of 2020 and 2021. We embarked on this process to highlight what our association must do to continue to be relevant. The other aim of this process is to take a fresh look at our strategic direction and rededicate ourselves to what is most important for us to do over the next five years.

We began with a visioning process during the January 2020 Board of Directors meeting in Florida. During that meeting facilitators from McKinley Advisors led the board through an orientation process and conducted several exercises to identify key strategic issues for IBTTA to address. Board members engaged in robust conversations about the challenges and opportunities facing the industry and IBTTA. The meeting provided a wonderful opportunity for board members to bond and think about the future.

As the COVID-19 pandemic took hold in March 2020, we put our visioning process on hold as we pivoted to a new environment of lockdowns, travel bans, social distancing, and virtual meetings.

In January 2021, we relaunched the process by holding a series of facilitated conversations with the IBTTA Board, Past Presidents Advisory Council, Council of Platinum Sponsors, and Young Professionals Council. We also launched a comprehensive member survey to better understand the wants, needs, and interests of the members and gauge their aspirations for the future of IBTTA. We learned a great deal in the process.

Strategic Approach/Philosophy

The approach in defining the new strategic direction was not to identify what IBTTA wants to continue doing today (its current operational plan). Rather, the leadership team determined what the Association is not doing today, but must engage in to be successful in the future.

This strategic direction is not about business as usual — ***it is about the change needed to stay relevant!*** This separates the strategic plan from the operational plan. Both are important. The strategic direction is a constant reminder, as the leadership team oversees the development of the annual operational plan, of what must be changed to stay relevant to what members are seeing in their real world.

Embracing the Past As We Build the Future

As we look to the future, we are also mindful of the important goals from past strategic plans that are still relevant today. Among them are these principles:

- a) IBTTA will be recognized as THE advocate for tolling.
- b) IBTTA will be recognized as THE central clearinghouse of toll industry information.
- c) IBTTA will be recognized as THE leader in producing the highest quality meetings and educational experiences for the toll industry in every region of the world that embraces user financed transportation.
- d) IBTTA members and stakeholders will find indispensable value in the association's programs, products, services, and meetings.

These goals from past strategic plans continue to animate IBTTA and its members as we embrace our new strategic vision.

IBTTA'S NEW STRATEGIC PLAN 2022-2024

Here is the new strategic plan for IBTTA which builds upon the vital framework of past strategic plans.

Mission

IBTTA is the worldwide alliance of toll facility operators and associated industries that provides a forum for sharing knowledge and ideas to promote and enhance user financed transportation.

Vision

To be the world's leading resource and advocate for safe, sustainable mobility supported by tolling, pricing, and road use charging.

Core Values

- **Excellence.** We strive for excellence in all our endeavors.
- **Together.** We know we are stronger together than we are apart.
- **Teamwork.** We respect the talents and contributions of all and play like a team.
- **Legacy.** We stand on the shoulders of and honor those who preceded us.
- **Partnership.** We recognize our limitations and work with others to advance common goals.

Strategic Outcomes

Outcome 1: IBTTA Is The Leader In Driving Road User Payment Principles.

To achieve this outcome, we will:

1. Act as a catalyst and incubator for innovative solutions that meet the needs of our members and their customers.
2. Expand our tent to welcome both the worldwide tolling industry and other forms of transportation and mobility.
3. Partner with other associations and organizations to advance road user payment principles.
4. Develop solutions to address climate change.

Outcome 2: IBTTA Promotes and Exemplifies Diversity, Equity and Inclusion

To achieve this outcome, we will:

1. Assure that diversity, equity, inclusion, ethical behavior and cultural awareness are embedded in IBTTA governance, operations, programs and services.
2. Strive to increase diversity so that individuals of all backgrounds are valued and equitably included in our industry.

Next Steps

This strategic plan becomes effective once the IBTTA Board of Directors approves it. Once this plan is approved, the staff will create an operations plan outlining specific actions to bring about the strategic outcomes.

APPENDIX – BACKGROUND INFORMATION AND SURVEY RESULTS

Highlights Of The Member Survey: Member Satisfaction Is High And The Value Of Membership Compared To Cost Is High.

The electronic survey was distributed by IBTTA to 4,654 contacts (members, former members, prospects) and was fielded over a period of fourteen days between March 30 and April 12, 2021. In total, 342 respondents completed or partially completed the survey questionnaire for an overall response rate of 7.3%. This is comparable to the 2020 survey effort, which yielded a total of 304 responses and a response rate of 6.5%.

- Overall, reported satisfaction and value compared to cost are high, are above the industry average, and have increased since April 2020.
- Respondents value connecting with others in the industry, collaborating, and having access to data and information.
- Newly launched programs rated as being extremely or very valuable by most respondents include topical webinars, the Women in Tolling Council and the Peer-to-Peer Program.
- Most respondents preferred that IBTTA keep offering virtual events along with in-person conferences and events that provide opportunities to participate or view proceedings virtually.
- Top priorities that respondents commonly cited for IBTTA include better educating the public about transportation and its funding and facilitating more networking opportunities among members and professionals in the industry.
- Going forward, respondents prefer that IBTTA “expand the tent” to embrace new stakeholders within the broader mobility space and advance and represent mobility and transportation. New stakeholders that respondents most commonly want IBTTA to engage include Departments of Transportation, technology firms, manufacturers and freight and logistic companies.
- In terms of challenges, respondents were most likely to believe that road charging and innovation and technology will have the greatest impact on the international tolling industry within the next three years.
- Respondents commonly reported that their business is about as successful now compared to January 2020. Vendors/suppliers were more likely to report their business is more successful today compared to January 2020, while toll agency/operators were more likely to say their business is less successful.

Highlights Of The Facilitated Discussions – Continuing To Be Relevant

One of the main goals of our strategic visioning process is to position IBTTA to continue to stay relevant to its members and other stakeholders. During the facilitated discussions with the

Board, Past Presidents and Council of Platinum Sponsors, McKinley Advisors asked this question to get at the notion of relevance: **What issues, causes and concerns does IBTTA need to “get on the right side of” to continue to be relevant?”**

Here are the issues most mentioned by the three groups:

1. **Social Justice.** Examples of this issue include being a leader of social justice in the industry; increasing equity and transparency in the industry; and supporting a diverse workforce pipeline within the industry.
2. **Climate Change.** Examples include understanding the role the industry plays in climate change and environmental stewardship.
3. **Electrification.** Examples include understanding the changes that will happen because of expanded use of electric vehicles, including charging stations, etc.
4. **Innovative technologies.** Examples include the adoption of connected and automated vehicle technologies and applications.
5. **Tolling value proposition.** Examples include the need to clearly articulate the value proposition to justify tolling to customers.
6. **Future focused.** Examples include an awareness of the migration away from vehicle ownership; the role of micro freight; and monetizing mobility as a service.

OTHER OBSERVATIONS FROM THE FACILITATED DISCUSSIONS

During the facilitated discussions, we further explored what people felt about the paired statements: (a) “Focus on serving existing stakeholders within the tolling industry” versus (b) “Expand the tent to embrace new stakeholders within the broader mobility space.”

Don’t dilute the culture. Participants in the facilitated discussions expressed a strong belief that IBTTA needs to focus on the core mission of tolling because that’s what makes IBTTA valuable. Most said they want to maintain the social dynamic and networking value of IBTTA and avoid diluting them by over-expanding the tent.

Engage newcomers to our industry. On the other hand, there is a strong belief that the IBTTA tent is already expanding. We are seeing a different group of companies and specialties already becoming part of IBTTA such as:

- Big tech companies
- Mobile payment processors
- Cloud computing providers

Young Professionals. We also held a facilitated discussion with members of the Young Professionals Council. This group interpreted the phrase “expanding the tent” as an effort to be more inviting to younger and less senior professionals in the industry. For them it wasn’t only

about expanding the types of companies that should be involved in IBTTA; it was also about the age and experience of the individuals who are invited to participate in IBTTA activities such as meetings, working groups, and governance.

Embracing Road Usage Charging. In the facilitated discussions, there was significant support for the idea of expanding the mission of IBTTA to go beyond “tolling.” Road Usage Charging (RUC) is seen as the future of surface transportation funding – replacing the fuel tax and working side-by-side or hand-in-glove with tolling. Many participants felt that IBTTA and its members need to embrace RUC, leverage existing tolling experience and expertise to develop RUC, and become the leaders in implementing and advancing RUC.

Mobility as a Service. MaaS was also mentioned as a potential area for IBTTA to explore and engage in, but without the same passion and energy as that relating to RUC.

New payment options and transactions. There was also sizeable support for the idea that new payment options, including mobile payments, are already here and that the industry needs to get on board. New connected vehicle technologies will change the way in-vehicle commercial transactions are enabled, executed, processed and collected. The convergence of tolling and transportation pricing with other commercial transactions will change the way we do business, our partnerships, and opportunities for operational efficiency, customer experience, and the value proposition.

COMPLETING THE PLAN

Over the course of nearly two years, we have engaged key stakeholders in robust discussions about the future of the industry and IBTTA. The outcome of these discussions are reflected in the strategic plan above and in the appendix. In completing the plan, we have adopted:

- a mission that defines why we exist and around which we will dedicate our resources and activity.
- a vision for the future that inspires people and keeps us stretching to achieve more than we might have thought possible.
- a set of core values that define how we behave as an association.
- a set of strategic outcomes that are aligned with our mission and which can move us towards our vision.

To implement the plan, we will:

- develop and employ the appropriate resources to give ourselves the best chance of success in advancing the strategic outcomes.
- monitor progress in achieving the strategic outcomes and evaluate their effect on our mission and their ability to move us closer to our vision.

The IBTTA Board of Directors wishes to express its appreciation to all stakeholders who contributed to this strategic plan, especially the Past Presidents Advisory Council, the Council of Platinum Sponsors, the Young Professionals Council, and all who completed the member surveys. We are indebted to all IBTTA members for your support and for sharing your interests and perspectives with us in this important work.

Sincerely,

The IBTTA Board