

STRATEGIC PLANNING REPORT



Safety is our Driving Concern

Strategic Plan

2015-2017+

November 24, 2014

**Advocating, promoting and educating a
safe and sustainable trucking industry.**

“The new NCTA.”

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Strategic Plan 2015 – 2017

Foreword

The North Carolina Trucking Association was founded in 1929. It is associated with a Political Action Committee to increase political influence and the NCTA Foundation for education and scholarship. NCTA currently represents about 350 members, an equal combination of operators and allied suppliers.

A strategic planning or steering committee (subset of the 43 member board of directors) was convened to review image, governance and membership to create a plan. It was pointed out that the 80-20% rule applies – with membership down and 20% or less of industry operators taking responsibility for the advocacy, education and promotion. It was suggested that NCTA should communicate that industry should act as a united force¹.

Several themes discussed throughout the day included:

- The strategic plan should be the catalyst for reinvigorating the value and image of NCTA in its 85th year.
- Additional tangible benefits are needed, for example reports and benchmarks specific to NC.

¹ Twenty one years before NCTA was founded, President Roosevelt commented on industry responsibilities with these words: "Every man owes a part of his time and money to the business or industry in which he is engaged. No man has a moral right to withhold his support from an organization that is striving to improve conditions within his sphere."

- The association should position itself as it currently is: *The* authority on all things trucking.
- The governance structure should be efficient and effective for the size of the association/corporation.

Mission Statement

The mission statement is the organization’s purpose for existence. It should be easy to communicate and clear to internal and external audiences. The existing mission:

NCTA serves as the industry's primary voice on transportation and other public policy issues. NCTA works to protect the interests of North Carolina's trucking industry by working with state and federal regulatory and enforcement agencies. We are also dedicated to providing excellence in: Education, Training, Information. And promoting a safe, dependable and cost-effective motor transportation infrastructure to the betterment of the trucking industry in North Carolina.

The strategic planning committee revised the mission to read:

To advocate, promote and educate a safe and sustainable trucking industry.

Goals

Goals are the core competencies of the association. They were referenced as the pillars of NCTA built upon a solid foundation

These are areas where the board is committed to allocating time and resources. The strategy committee set five goals. Four are external goals to advance and the fifth is sustaining the infrastructure of NCTA.

- I. **Member Value** – Significant benefits and services for members.
- II. **Education** – Education, resources and conferences for the industry.
- III. **Advocacy** – The voice of the trucking industry.
- IV. **Image & Communications** – Position the industry as a significant aspect of the economy.
- V. **Structure** – A dynamic trade association with authentic leadership.



Strategies

Strategies are ways to advance the goals. These should be supported by performance metrics and timelines carried out by committees, board and staff over the span of three years.

- I. **Member Value** – Significant benefits and services for members.
 - A. **Membership Support Materials** – Update or create collateral to communicate the benefits, services and return on investment for members; improve brand promotion by distributing NCTA promotional materials (i.e. hats, decals.)
 - B. **Reports and Demographic** – Research and create reports of value to industry operations and sustainably, i.e. operating ratios, key performance indicators, state industry benchmarks². (Available to non-members for additional cost.)
 - C. **Membership Growth** – Focus on retaining members, maintaining annual retention rate of 90% or above. Set growth goals for industry segments that have greatest impact (small, medium and large operators) and focus on private fleets and shippers as members; consider a driver-member category³. Overall goal might be 20% of the respected industry members by the year 2020.
 - D. **Benefits and Services** – Develop new benefits beyond affinity programs, for example operating ratio reports, NC specific trends, etc.
 - E. **Driver Retention** – Recognizing the importance to operators, create a Driver Initiative Task Force.⁴ Collaborate with schools to enhance retention and focus on driver image issues.
- II. **Education** – Education, resources and conferences for the industry.
 - A. **Annual Conference** – Promote the professionalism, value and opportunities afforded by professional annual conference.
 - B. **New Entrant Training** – Provide entry level management skills and resources to promote the sustainability and profitability of members; maximize use of allied members (i.e. legal, accounting, safety) to provide training and resources.

² The same reports will support advocacy and promotion efforts.

³ Explore others states that have a driver-member category.

⁴ Luke Mangum to lead task force to report on ways to involve, include, attract, retain, etc.

- C. **College Partnerships** – Collaborate with the college on developing and supporting a two-year certification program.
- D. **Driver Finishing School** – Enhance driver education and retention through the driver finishing school.
- E. **NCTA Safety Management & Human Resources and Technology & Maintenance Council Joint Annual Conference** – Plan annual conference by coordinating the Councils’ training content into an industry wide conference.

III. **Advocacy** – The voice of the trucking industry.

- A. **Political Action Committee** – Maintain a sustainable amount in the PAC to position trucking to have influence in politics; enforce accountability for board leading the PAC contributions.
- B. **Member Involvement** – Promote member support of the annual Call on Washington Visit (ATA) and state Truckers Day at the Capitol (NCTA).
- C. **Platform** – Develop and promote a platform of trucking industry issues and positions so that members can communicate knowledgably with lawmakers and regulators.
- D. **Coalitions** – Maintain collaborative relations with organizations such as the state Chamber of Commerce, Economic Development Council, etc. to promote the economic impact of trucking.
- E. **Lobbying** – Maintain sufficient lobbying coverage to monitor and influence state Legislature and regulatory agencies.

IV. **Image & Communications** – Position the industry as a significant aspect of the economy.

- A. **NCTA Image** – Conduct a comprehensive revision of the association brand (logo, taglines, collateral, website, etc.) to reposition NCTA for the 21st century. Request members to promote the brand and link their websites with NCTA.
- B. **Internet Presence** - Strategically position NCTA to be first in internet search findings through search engine optimization and ad placement; make use of social media; promote member operator testimonials.

- C. **Philanthropic Activity** – Identify a charitable projector or partner in which NCTA can align to favorably position members through philanthropy⁵.
 - D. **Move America Forward**[®] - Build on the national public relations campaign promoted by ATA.
- V. **Trade Association** – A dynamic trade association with authentic leadership.
- A. **Governing Responsibilities** – Recommend need to sustain a dynamic association with an increased frequency (quarterly) of board meeting and the appropriate size board; enforce accountability for leadership support of the PAC; consider moving inactive board members to a Legacy Council to continue their involvement; include the Maintenance and Safety Council chairs at all duly called board meetings.
 - B. **Technology** – Invest in the equipment, hardware and software necessary to improve service, communications and operations.
 - C. **NCTA Office** – Relocate office for Capitol area presence and sufficient space for staffing and growth.
 - D. **Committees** - Align the committees within the goals of the strategic plan; committee chairs should be goal champions to ensure strategies are advanced and reported to the board. Appoint task forces for short term projects.
 - E. **Councils** – Integrate the programs of the Maintenance and Safety Councils; recommend an annual meeting for the industry; ensure Council involvement at board meetings.
 - F. **Finances** – Diversity revenue, increase through membership growth, and determine the best use and limits on savings reserve.
 - G. **Strategic Plan** – Rely on the appointed strategic plan committee or the executive committee to monitor and report on progress of the strategic plan; promote the new image of NCTA, mission, goals and priorities to the member and the industry.

Next Steps

The success of the strategic plan requires execution by the board, committees and staff:

⁵ Several directors offered to check organizations such as Boys and Girls Club, Women in Trucking, human trafficking, etc.

- Review of the final report by the officers, staff and board.
- A motion to approve by the board of directors.
- Member awareness.
- Alignment of committees.
- Annual review at board orientation.
- Comprehensive update in three years.

Leadership

Roy Cox – Best Cartage, Inc. – Chairman of the NCTA Board

Al Ganey - Ezzell Trucking, Inc.

Bill Gansman - All State Express, Inc.

Chris Hill - Hale Trailer Brake & Wheel, Inc.

Delores Lail -Ryder System, Inc.

Timothy Lively - Food Lion, LLC / DelHaize America,LLC

David Locke, Jr. - Mack Truck Sales of Charlotte, Inc.

Luke Mangum - Mangum's, Inc.

Gerald Myers - Edwards Wood Products Inc.Transportation

Jerry Sigmon, Jr. - Cargo Transporters, Inc.

Ralph Stanley - Brown Trucking Company

John Williams - Tidewater Transit Co., Inc.

David Yarbrough, Jr. - Yarbrough Transfer Company

Crystal Collins – NCTA President

Membership Value

The board identified a number of aspects in which significant value is offered to members.

- Industry Awards and Recognitions
- Career and Leadership Opportunities
- Opportunity to Influence Public Policy
- Access to Allied Members
- Conference and Education
- Maintenance and Safety Councils
- Benefits, Service, Affinity Programs
- Professional Staff Assistance
- Reputation of Strong 85 Year Trade Association
- Networking and Connectivity with Peers
- NCTA Brand, Logo Usage for Credibility
- Industry Reports Unique to NC
- Users Groups, Committees and Councils
- Publications and Member Directory
- Philanthropic Efforts
- Continual Vigilance on Members' Behalf

Priorities

