



# Patriot Chapter Annual Work Plan & Quarterly Progress Report

---

## Chapter Work Plan & Quarterly Reporting Instructions

ACT's chapters are required to develop an annual work plan for each calendar year. The work plan lays out your chapter's planned activities, identifies leads for each item, and estimated completion dates. The following template is to be used by chapters for their work plan. This template also serves as a quarterly reporting form that is to be submitted to National.

**Due Dates:**      December 1 – Annual Work Plan Due  
                          January 15 – 4<sup>th</sup> Quarter Progress Report Due  
                          April 15 – 1<sup>st</sup> Quarter Progress Report Due  
                          July 15 – 2<sup>nd</sup> Quarter Progress Report Due  
                          October 15<sup>th</sup> – 3<sup>rd</sup> Quarter Progress Report Due

**Send to:**         [info@actweb.org](mailto:info@actweb.org)

**Chapter Leadership:** Please provide information on all chapter officers

**Work Plan Tasks:** Required tasks for all work plans have been identified with an apteryx (\*). To provide true value to ACT members within your chapter you are encouraged to identify additional projects and programs that will be worked on during the year. The following is a list of potential items that you may choose to implement. You are welcome to add others.



# Patriot Chapter Annual Work Plan & Quarterly Progress Report

**Work Plan Year: 2017 (Final)**

**Quarterly Update for:**    \_\_\_ January – March    \_\_\_ April – June    \_\_\_ July – September    \_\_\_ October – December

**Chapter Leadership**

President	Vice President	Secretary	Treasurer
Name: Eve Stokes Org: NuRide, Inc. P) 860-661-0310 x120 E) estokes@nuride.com	Name: Sandy Thibault Org: Chittenden Area TMA (CATMA) P) 802-656-7433 E) sandy@catmavt.org	Name: Ed Perzanowski Org: CTrides P) 860-384-3989 E) ed.perzanowski@ctrides.com	Name: Ben Hammer Org: Harvard University P) 617-384-9880 E) Benjamin_hammer@harvard.edu
Public Policy Rep	Membership Chair	Communications Chair	Program Chair
Name: Andrea Leary Org: Merrimack Valley TMA / North Shore TMA / Junction TMO P) 781-639-6262 E) andrealeary@verizon.net	Name: Patrick Sullivan Org: Seaport TMA P) 617-385-5510 E) Patrick.sullivan@seaporttma.org	Name: Becca Cyr Org: MassRIDES P) 857-368-8657 E) Rebecca.cyr@state.ma.us	Name: Sandy and Ed (co-chairs) Org: above P) above E) above
Other: Immediate Past President	Other:	Other:	Other:
Name: Patrick Sullivan Org: Seaport TMA P) 617-385-5510 E) Patrick.sullivan@seaporttma.org	Name: Org: P) E)	Name: Org: P) E)	Name: Org: P) E)

**Key Objectives and Tasks:**

**1. Increase member value in ACT through chapter activities**

Tasks	Lead	Date Due	Status/Comments
Continue second year of “The State of the New England Commute”-themed member events and activities	S. Thibault E. Perzanowski	Ongoing	
Explore hosting bi-annual chapter conference	S. Thibault E. Perzanowski	Spring	
Plan and host one chapter meeting in conjunction with ACT Int’l Conference	S. Thibault E. Perzanowski	Summer	
Plan and host two chapter meetings with program speakers and social activities; preferably one to be outside of the Boston area	S. Thibault E. Perzanowski	2 of 3: Spring / Fall / Winter	



# Patriot Chapter Annual Work Plan & Quarterly Progress Report

Implement a conference call-in and/or video option for members unable to attend meetings in person	E. Perzanowski	Spring	
Publish a quarterly chapter newsletter	P. Sullivan	Spring / Summer / Fall / Winter	
Utilize social media to expand member engagement; chapter posts, relevant re-posts, and member shares	B. Cyr M. Guerrero	Ongoing	
Compile and provide an online presentation library and TDM resources listing for members	tbd	Summer	

## 2. Promote & grow membership to create a vibrant community of TDM professionals within the chapter

Tasks	Lead	Date Due	Status/Comments
Maintain, with quarterly updates from ACT National, current chapter membership directory	E. Stokes P. Sullivan	Quarterly	
Use current membership directory for chapter newsletter, meeting announcements, and message distribution	E. Stokes P. Sullivan	Ongoing	
Develop a prospective member list and share with ACT National Membership Committee	E. Stokes P. Sullivan	Quarterly	
Utilize chapter meetings and events as recruitment tools to increase ACT membership	S. Thibault E. Perzanowski	Spring / Summer / Fall / Winter	
Use prospective member list for meeting announcements and message distribution	E. Stokes P. Sullivan	Ongoing	
Encourage members to recruit prospective and new members	E. Stokes P. Sullivan	Ongoing	
Conduct prospect outreach: Develop communications strategy to recruit and engage prospective members	E. Stokes P. Sullivan	Spring	
Explore partnerships and/or joint events with related organizations, e.g., the New England Parking Council	S. Thibault E. Perzanowski	Summer	
Ensure current member retention and new member recruitment to achieve 10% net growth	E. Stokes P. Sullivan	Ongoing	



# Patriot Chapter Annual Work Plan & Quarterly Progress Report

### 3. Support ACT National activities, programs, and advocacy efforts

Tasks	Lead	Date Due	Status/Comments
Provide updates to ACT National for chapter page on website	E. Stokes	Feb / July	
Submit article on chapter activities for ACT Connections newsletter	E. Stokes	tbd – 1/year	
Encourage member participation at ACT Public Policy Summit, International Conference, and TDM Forum	E. Stokes	Apr / July / Oct	
Provide chapter scholarships for ACT International Conference and TDM Forum	S. Thibault B. Cyr	June / Sept	
Encourage member participation in Net Conferences / Webinars	S. Thibault E. Perzanowski	As scheduled	
Solicit and secure Chapter representation on each ACT Council and Committee	E. Stokes S. Thibault	Feb / July	
Participate in ACT Leadership calls	E. Stokes P. Sullivan B. Cyr	Quarterly	
Ensure Chapter representation at ACT National Board Meetings	B. Cyr	Quarterly	
Recruit members for participation in ACT PALs program; mentors and mentees	S. Thibault	Spring	
Support ACT certification process and promote when available	tbd	As available	

### 4. Create a healthy and robust chapter

Tasks	Lead	Date Due	Status/Comments
Host monthly chapter board of directors' meetings via conference call	E. Stokes	Monthly	
Develop and implement event planning templates	S. Thibault E. Perzanowski	Spring	
Encourage chapter member involvement in meeting and event planning as well as attendance at chapter meetings	S. Thibault E. Perzanowski	Ongoing	



# Patriot Chapter Annual Work Plan & Quarterly Progress Report

Survey membership for event feedback and preferences	S. Thibault E. Perzanowski	Annually	
Solicit chapter newsletter content from members, including scholarship recipients	P. Sullivan	Spring / Summer / Fall / Winter	
Review responses, including open rates, of electronic communications	P. Sullivan	Spring / Summer / Fall / Winter	
Provide quarterly reports on work plan and budget to National Board	E. Stokes B. Hammer	April / July / Oct / Dec	
Submit annual 990N to IRS	B. Hammer	By May 15	
Conduct chapter elections	Committee tbd	Oct	
Develop and maintain a work plan and budget to support chapter activities	E. Stokes	Nov	

**Tentative Meeting Dates (Month & Day)**

1. Board of Directors: Monthly on the third Wednesday at 10:00 am via conference call
2. Chapter meeting concurrent with ACT International Conference (July 30 – August 2)
3. Chapter member meetings and joint events (tbd)
4. Chapter Conference / Workshop (tbd)

<b>List any issues with which the chapter needs guidance:</b>
<ol style="list-style-type: none"> <li>1. Video conferencing – quarterly access</li> <li>2. Online TDM resource library – recommended platform or provider?</li> <li>3. Schedule of national events (location, timing, logistics) - 12-24 months in advance to allow for chapter event planning / participation</li> </ol>

<b>List any resources needed from ACT National to support the implementation of Council work plan:</b>