Wake Transit

Workgroup Operating Guidelines

2026 Update to the Operating Guidelines-Summary

CAMPO staff completed a review of the Workgroup Operating Guidelines in April 2026. The Program Development Subcommittee will review and recommend TPAC adoption of the updated policy on May 26, 2026 and the TPAC considers adoption on June 25, 2026.

Wake Transit Workgroup Operating Guidelines

Purpose

The Wake Transit Workgroup Operating Guidelines (Guide) is a reference tool to be used by workgroup convening bodies that want or are requested to create a new workgroup, recall a previously established workgroup or amend the purpose of an existing workgroup. The Guide provides a framework for identifying and tracking workgroups operating in support of Wake Transit programs and projects. The Guide also sets applicability requirements for workgroups based on the nature of tasks assigned to the convening body.

Workgroup Definition

Wake Transit workgroups are created through TPAC action and are managed by a designated Coordinator. Each workgroup has a clearly defined purpose and a set of deliverables to be accomplished within an identified timeline. Members can represent multiple organizations, disciplines, or otherwise have the expertise needed to support the specific task(s) assigned to the workgroup. In general, Workgroups are ad hoc, meaning that they are typically developed in response to an emergent situation or an unforeseen development or concern. These unplanned groups are called upon to provide guidance to TPAC or its subcommittees.

Workgroups dissolve once the assigned tasks are complete but may be recalled if a new task arises that falls within the purpose of the group.

Developing and Managing a Workgroup

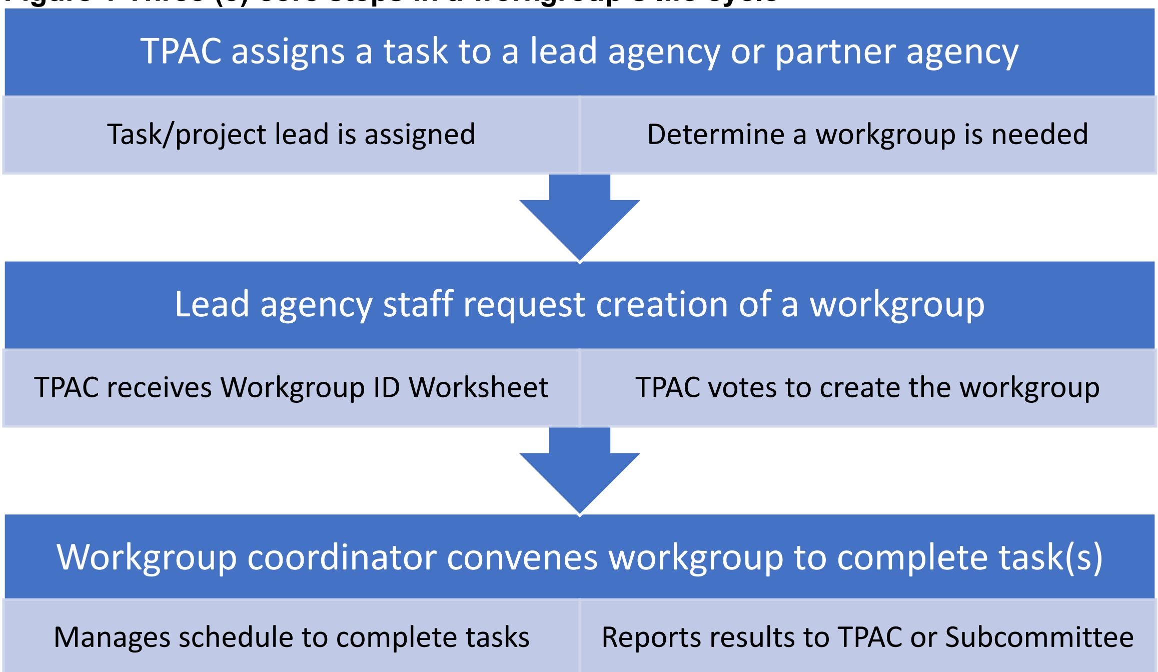
Workgroups most often support the planning and development of specific components of a larger planning effort.

For example, CAMPO is the assigned lead agency for developing each annual Wake Transit Work Plan. During the pandemic and after, there was an increasing need for safety and security staff to support transit operators and facilities. A workgroup was created to evaluate the need and recommend a policy for funding security staff in the current and future Work Plans. The workgroup was disbanded after completing its task of providing a recommended policy for TPAC consideration. TPAC ultimately adopted the Operations Security Funding Policy (2025).

In general, the workgroup development process includes these steps:

- TPAC designates a lead agency or project sponsor to lead a task/project.
- The lead determines if they need to convene a workgroup to complete all or a portion of that assigned task.
- The lead designates one person to act as Coordinator of the workgroup.
- The coordinator fills out the Workgroup Identification Worksheet and presents it to TPAC with a request to create a new or recall a previous workgroup.
- TPAC votes to create the workgroup, approves a scope and schedule, and confirms the task(s) assigned to the group.
- The coordinator convenes the group, as needed, to complete the tasks within the set timeline.
- The coordinator reports on workgroup progress as part of the monthly TPAC agenda.
- Results/recommendations of the workgroup are given to TPAC or its subcommittee to move the information toward approval or adoption.

Figure 1 Three (3) core steps in a workgroup's life cycle



Examples of Established Wake Transit Workgroups

The Fare Workgroup was convened by the TPAC to address fare-related questions and to support planning for fare-related programs that tend to have regional and/or multi-jurisdictional impacts.

The Art and Culture Workgroup was convened by the Budget & Finance Subcommittee to accomplish a specific task included on its TPAC-endorsed Work Task List.

The Wake Transit Vision Plan Update Core Technical Team (CTT), Community Funding Area Program Workgroup, Bus Plan CTT and Future Fixed Guideway Major Investment Study CTT are examples of workgroups convened to accomplish tasks that have been assigned by the governing boards, the CAMPO Executive Board and GoTriangle Board of Trustees, to a lead agency.

The Wake Bus Rapid Transit (BRT) Technical Committee, Downtown Cary Multimodal Facility Technical Committee, Wake Transit Performance Tracker CTT, and the Regional Technology Integration Study Technical Committee were all convened by project sponsors designated to deliver projects included in annual Wake Transit Work Plans.

Roles & Responsibilities

Convening Body-TPAC

The creation of a workgroup is a decision of the TPAC. It will approve the purpose, scope, schedule, structure, and task assignments. It will also approve the coordinator of the workgroup. After reviewing and approving the Workgroup Identification Worksheet and deciding to create a new or to recall a former workgroup, TPAC will receive a monthly progress update as part of its regular monthly meeting agenda process.

Coordinator

Each Workgroup Coordinator is designated by and works closely with the lead agency or project sponsor responsible for completing the task for the TPAC. From initial identification through dissolvement, the coordinator manages the day-to-day activities of the workgroup.

Some tasks of the coordinator are assigned by these guidelines. These include submitting the Identification Worksheet and presenting it to TPAC, providing monthly progress updates to TPAC, facilitating the workgroup's activities, and acting as the point of contact for others to get information about the group. Coordinators will maintain a workgroup member roster and will be responsible for scheduling, providing agendas (at least 3 days in advance) and taking summary notes/minutes for workgroup meetings. The lead agency may also ask the coordinator to prepare and give final presentations of results or recommendations to the TPAC or other bodies. The results presentation should include any final deliverables, an explanation of proposed next steps or recommendations, and the intended future of the workgroup. For example, will it dissolve permanently, become dormant until it is needed for a recurring project or new task, or will it continue to meet regularly as it works on additional assigned projects and tasks.

> *WORKGROUP MEMBERSHIP*
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> *The membership of each workgroup is unique to the task(s) assigned. Which agencies and organizations are included on the member roster is drafted by the coordinator and approved on the TPAC when they review the identification worksheet and create the workgroup. It is the job of the coordinator to send out invitations and to maintain the member roster. A member can be anyone that brings value, unique experience or perspective or has regulatory authority over aspects of a task. Any TPAC member can join a workgroup by emailing the coordinator and requesting to be added as a member.*

TPAC Administrator

The TPAC Administrator is responsible for supporting lead agencies, project sponsors and coordinators through the process of establishing a workgroup. A copy of the approved Identification worksheet will be saved in TPAC folders. As planning milestones are reached and tasks of the workgroup near completion, the TPAC administrator will work with the Coordinator, TPAC and Subcommittee Chairs to place workgroup items on appropriate meeting agendas and support moving deliverables through the TPAC adoption process including support for presenting to the Wake Transit governing boards at CAMPO and GoTriangle.

As needed, the Administrator will facilitate the process to review, revise and update the Workgroup Operating Guidelines.

TPAC

Members of the TPAC will receive workgroup presentations as part of regular meeting agendas. The first touchpoint with the TPAC will be when the workgroup is created. The submitted Identification Worksheet will be presented for discussion and to increase member awareness of the corresponding work being undertaken in support of the Wake Transit program. The final touchpoint with the TPAC will be in the form of a results presentation or as a general closeout report from the workgroup coordinator. Any new or revised tasks that are added to the workgroup scope or adjustments to the schedule must come back to TPAC for approval. TPAC approves the dissolution of a workgroup when requested or when it determines the workgroup is no longer needed or ineffective.

Workgroup Worksheets

Identification Worksheet

All applicable Wake Transit workgroups must have an Identification Worksheet on file with the TPAC Administrator. The coordinator and TPAC use the worksheet to develop and define the workgroup. Once all questions on the Identification Worksheet have been answered, a copy is submitted to the TPAC Administrator for inclusion on the upcoming TPAC agenda and once approved by TPAC, will save it in the TPAC's workgroup files.

An updated Identification Worksheet should be submitted when substantial changes are made to the version currently on file. Some example situations include: a Coordinator change, new tasks assigned to the group, the timeline for completion is modified significantly.

All questions about TPAC Workgroups should be emailed to the TPAC Administrator.

Appendix A: TPAC Administrator Contact Information

Stephanie Plancich
TPAC Administrator

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Office Address:
Capital Area MPO
1 Fenton Maon, Ste 201
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Appendix B: Identification Worksheet

Identification Worksheet

An Identification Worksheet must be submitted any time a new workgroup is created in support of Wake Transit Plan implementation activities, is recalled or when the information approved on the worksheet changes significantly.

1. **Convening body** – Select the type of convening body from the drop-down menu provided.
2. **Name** – Insert the name of the convening body
3. **Workgroup name** – Write in the name of the new group.
4. **Contact person/Coordinator** – The person assigned to facilitate the activities of the workgroup. Type in their name, phone, and email address.
5. **Purpose of the group** – The purpose statement should be broad but clearly describe the overarching purpose of the group. Example 1: Support the development of the Community Funding Area program. Example 2: Provide technical support for BRT program development.
6. **Specific Tasks/Deliverables** – Insert a bulleted list of the specific tasks/deliverables assigned to be produced by the workgroup.
7. **Timeline** – Enter a start date and expected completion date for the workgroup to complete the assigned tasks.
8. **Delivery Cycle** – Select an option from the drop-down menu which includes selections for one time only, monthly, annually, etc.
9. **Delivery Details** – Provide more details about the delivery cycle as needed here. Ex. Produce a specific report every 4 years in support of a major plan update.
10. **Presentation or Approval Identification** – A list of common entities who will approve or receive updates on workgroup activities are listed as reference. List each entity that applies to the new workgroup and select the level of its involvement from the drop-down menu.
11. **Member List** – This is a list of the agencies, organizations, businesses, community groups, demographic groups, etc. (not individuals) that are expected to be invited to participate as a member of the group. Can also list the specialties members will represent.
12. **TPAC Administration Section** – The date the worksheet is submitted and the date it is presented for information to the TPAC are written in, as well as any other notable information.

*Request a copy of the fillable form from the TPAC Administrator.