



MARKETING PLAN

for the California Chapter of the American Planning Association

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1.0 INTRODUCTION

In the latter half of 2012, the California Chapter of the American Planning Association (Chapter) decided to add a new position to its executive board whose goal would be to focus on membership and marketing activities at the Chapter level, Vice President for Marketing and Membership. The Chapter had seen a decline in membership since 2008 and recognized the need to actively curtail membership loss as well as position the Chapter to make a positive resurgence as the economic climate continues its slow recovery. The Chapter made this move out of sensitivity to comments from the membership as to how we might improve our services; many of the comments to this regard fall under the purview of a membership/marketing position.

The incoming president of the Chapter appointed the inaugural Vice President of Marketing and Membership and then the position will subsequently become an elected position. Since this is a new position on the Chapter Board of Directors (Board), the preparation of a Marketing Plan (Plan) was considered critical to define the role and set forth a clear set of goals and objectives. The goals define the purpose to which the endeavor is aimed and the objectives set measurable and tangible efforts towards which meeting of the aforementioned goals are directed.

The first step in the development of this Plan was the Chapter Board retreat which took place on January 11 and 12, 2013 in San Diego. During the retreat, the Board spent significant time deliberating on ways in which to improve the value of the Chapter to our membership, which spanned the various areas of function performed by individual board members. The discussion was collaborative with the Board breaking into small groups to consider the four themes, develop recommended actions and responsibility and report their conclusions to the group. Each group then moved to the next topic area subsequently until all of the groups discussed each theme. The outcomes were then summarized and assigned into the specific areas according to the designated portfolio/purview of the vice presidents.

This Plan is intended to achieve (or make substantive progress toward the achievement) of the numerous membership and marketing goals and actions identified at the retreat. This Plan represents the understanding of the Marketing and Membership position at the current time. As this is a newly created position and the areas of responsibility as well as key goals and objectives may change as the position is further refined, this Plan should be considered a “living document” and subject to change to change as necessary. The Plan is designed as a starting point and is open to discussion and further collaboration.

2.0 MARKETING AND MEMBERSHIP PLAN

2.1 Strengths and Weaknesses

The strengths of the Board related to its ability to maintain, increase, and cultivate future members lies in the fact that all of the members of the Board are capable and motivated and have the necessary experience collectively to address our challenges and develop creative ideas and solutions. In addition, many Board members have extensive experience with APA at various levels, experience and leadership in the planning profession, and a collaborative spirit.

Further, the redesign and re-launch of the Chapter website is timely in terms of launching a campaign to better serve existing members and improve the APA at the Chapter (and section) level.

William Hoose's, the appointed Vice President of Marketing and Membership, past experience includes serving as the Membership vice chair for Orange County Section for the past 18 months, has worked with the local host committee for the 2012 national conference, and been a member of APA since 2004. In addition, William's career outside of APA has required him to develop business at the program and company levels and has managed various groups in diverse industries. From 2005-2009 William served on the AEP Inland Empire board as vice chair of programs. These experiences will assist in the development and implementation of the plan.

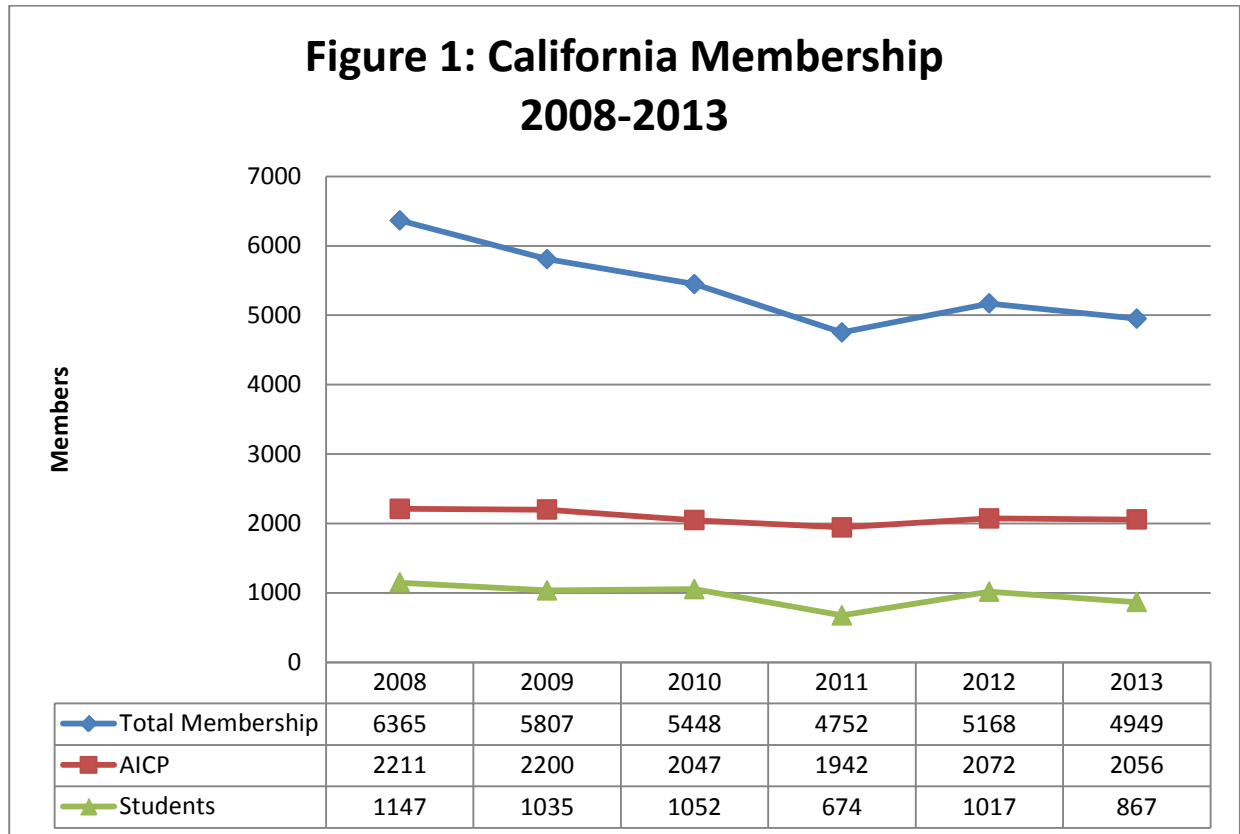
Weaknesses include the fact that this is a new position and the Board is essentially starting from scratch. While this is a weakness, it can also be considered a strength because the potential is not limited by previous work or convention. It is likely that the greatest weakness is the very nature of the Board; we are all volunteers who also have very demanding careers and personal obligations. Thus, it can be challenging to accomplish objectives that have multiple components and persons involved among volunteers. Commonplace "command and control" management methods are ineffective. Collegial collaboration and consensus rule the day and can have unique challenges.

2.2 Target Markets

Historically, APA has focused its efforts on those employed in the traditional field of planning by catering to planners employed by cities, counties, and other agencies involved in the practice. In the public agency realm, focus has been on staff-level and planning managers. APA has also focused on planners employed in the private sector serving as consultants. Undoubtedly there is a specific regard toward AICP planners in the amount of focus placed on offering CM credits. In addition, APA has shown a keen regard for students in planning-related programs and young professionals.

2.3 Current Membership Characteristics

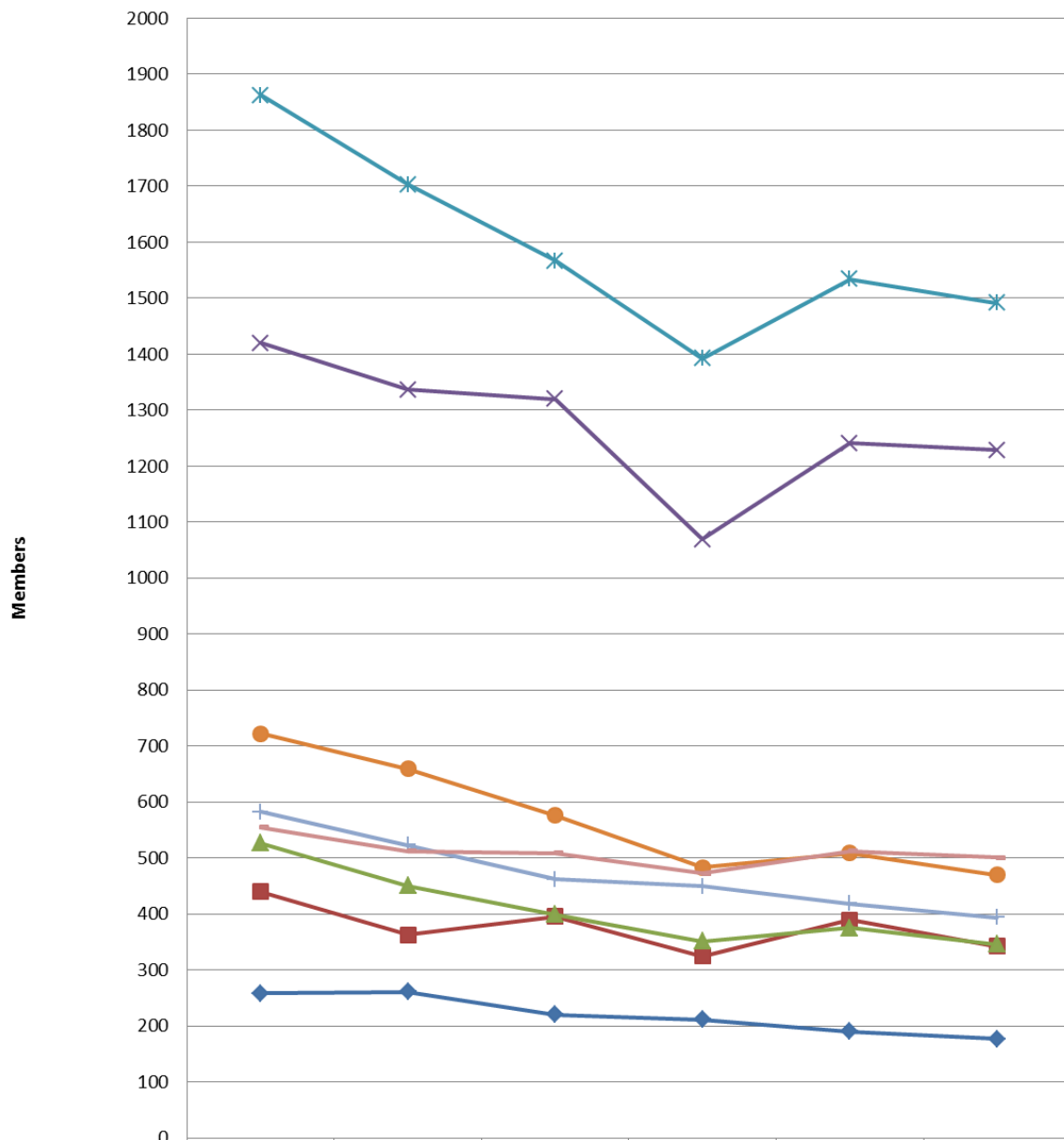
Figure 1 below shows the current Chapter-level membership trends from 2008 up to Q1 of 2013. Membership has declined approximately 22% or by 1,400 members since 2008, although it has recovered slightly from 2011 levels which were down approximately 25% from 2008. The decline in membership is



correlated with the Great Recession which began in December of 2007 and punctuated by the collapse on the US stock market in September 2008, the greatest decline in 75 years. The decline in membership lags behind the economic turmoil, presumably the result of the membership renewal cycle. The Inland Empire and Orange Sections had the greatest percentage decrease, 37% and 36%, respectively, while San Diego and Los Angeles saw the smallest decreases at 11% and 14%, respectively. Not surprisingly, the segment of membership which realized a relatively constant rate was the AICP members. Of note is that student membership decreased slightly over the same period but remained relatively constant (with the exception of the Central Coast Section which experienced yearly volatility). All sections realized a slight but noticeable dip in student membership in 2011 (except Sacramento where the dip occurred in 2012).

As the US economy continues to improve, led by an increase in jobs and development, it will be our challenge to entice former members to come back to APA as well as attract new ones.

**Figure 2: California Membership Trends - All Sections
(2008-2013)**



	2008 Total Membership	2009 Total Membership	2010 Total Membership	2011 Total Membership	2012 Total Membership	2013 Total Membership
Central	258	261	220	211	190	177
Central Coast	440	363	395	325	389	342
Inland Empire	526	450	399	351	375	346
Los Angeles	1420	1336	1320	1069	1241	1228
Northern	1862	1703	1567	1392	1534	1491
Orange	722	659	576	483	509	470
Sacramento	582	523	462	449	418	394
San Diego	555	512	509	472	512	501

2.4 Vision, Goals, and Objectives

A shared Vision is an important starting point for any successful plan; it serves as the destination and philosophical guidepost. It also is helpful to work backwards from the desired outcome to develop an implementable plan. Ultimately the Vision for membership and marketing for APA California is to strengthen and expand the value of membership throughout the state and further establish the Chapter as a go-to organization for planning and related activities. We understand that we are here to serve our membership by providing information that is current and relevant to planners as it relates to APA, the planning profession, our communities, and the world. We further understand that our membership looks to us to provide high value opportunities for professional and personal development.

As planners, the use of goals and objectives is one that is familiar. However, the differences and the specific purposes thereof merit a brief discussion. Goals tend to be more of a purpose towards which we are aiming and more abstract in nature and may not be strictly measurable. Objectives on the other hand, refer to something to which efforts are intended to accomplish and are specifically measurable and tangible; they are the steps that we intend to take in order to attain our goals

Our goals as they relate to membership and marketing for the California Chapter appear deceptively simple. In this case, our first two goals are in fact measurable, whereas the other goals are not easily measurable.

2.4.1 2013 California Chapter Goals

- Retain our current membership;
- Expand our membership roster;
- Increase communication between Chapter and Sections;
- Increase transparency of Chapter administration;
- Help reduce perception that Chapter languishes and is slow to action;
- Cultivate future members and markets.

2.4.2 2013 California Chapter Objectives

In order to organize and prioritize our plan to achieve the above-listed goals, the list of objectives has been phased over the remainder of the year (and beyond). They are divided into Near-Term, Mid-Term, and Long-Term Objectives. Near-Term refers in this case to actions taken in support of the aforementioned goals that will occur between the time of this writing and May 2013. Mid-Term refers to actions that would take place beginning in April-May until August. Long-Term refers to action that would take place between July-August and the end of 2013 and likely beyond.

2.4.2.1 Near-Term

- Develop Marketing Plan
- Set up APA email for membership responses
- Form all-Sections recurring call
- Select support staff to assist in membership and marketing efforts (consider geographic diversity)
- Work with Hing to advise on “Member’s Only” content
- Collect information for and write Cal Planner Article (next quarter)—member benefits (from annual report, CM credits, and section activity)
- Collect section survey information
- Discuss with Hing importance of e-Blast (share planning knowledge)
- Develop “small town” Chapter feel team-- Reach out to members whose membership is about to lapse; whose has lapsed, new members. Form official APA “greeters”.
- Improve coordination and collaboration with YPGs
- Coordinate with the Membership Inclusion Group
- Leverage APA experience/braintrust—As we develop plans, programs, and events, tap CPF, CPR, Planning Emeritus Network)
- Launch Pre-Conference Training (Vice President for Conferences and Vice President for Professional Development to conduct pilot in Visalia)
- Challenge Alexander Meyerhoff, AICP (City Manager Holtville) to spearhead Imperial Valley sub-section

2.4.2.2 Mid-Term

- Work on developing relationships with other associations: make list; determine level of formality (i.e. spot on board, MOU, etc); attend meetings/conference as applicable
 - AEP(Gene Tallmadge)
 - ULI (local leaders)
 - CA Urban Forestry (Nancy Hughes)
 - League of California Cities (Marc Yeber)
- Develop Chapter-wide YPG Starter/Maintainer Kit (Sac Valley has one)
- Work with Marc Yeber to enhance outreach to Planning Commissioners

2.4.2.3 Long-Term

- Assist with the preparation of Annual Report (publication by end of 2013)
- Help develop APA challenge—end of 2013

- Prepare end of year postcard (including conference session submittal and conference date)
- Pursue Outreach Plans (Planning Van)

3.0 SUMMARY

As described, the creation of this new Board position and the duties associated therewith, are being developed to achieve short- and long-term marketing and membership support success for the Chapter. Since this is the inaugural year, we expect to learn many lessons that will help refine and further develop the roles and responsibilities of the position in the future. As stated previously (and as plans should be), this Plan is a living document that is subject (and expected) to change. We intend to accomplish as many of the objectives as possible, as well as develop new and more effective objectives, all in support of attaining the goals set forth in this Plan.

Although long-term specifics of how to be successful may vary or change with time, the fundamentals in this Plan, which are based on a specific set of goals, will not. This Plan's intent is to guide the Chapter marketing and membership support process and provide a framework and action items for the future. Using proper prudence and steps outlined in this Plan, an openness to embrace new ideas, and collaboration with the Board and our members, we believe, will lead to the successful attainment of the identified goals. Although times are tough right now (but steadily improving), we believe this is a great time to be embarking upon this process and are excited to lead the effort.