

Chapter Performance Criteria

The Chapters of the American Planning Association serve to extend the mission of APA to individual states and regions. More so than APA itself, Chapters, are often the primary point of direct contact and interaction with the membership. As such, Chapters have a responsibility to provide quality customer service to both members and the communities served. This service is representative of not only each of our chapters, but also of one APA.

The Chapter Presidents Council (CPC) understands the limitations of a volunteer driven organization, but also recognizes that each chapter must provide a baseline level of service in order to fulfill APA's mission, satisfy the needs of the membership, and ensure the success of the overall organization. The CPC has therefore adopted these Chapter Performance Criteria to establish the baseline levels of service and functions that the members of each chapter of APA deserve to expect in return for their dues dollars.

The Chapter Performance Criteria are divided into two parts—the first are mandatory components necessary for the Chapter to remain in good standing while the second provide a series of standards of success that a high-performance Chapter will strive to meet or exceed; completion of at least four electives is also required for a chapter to remain in good standing. The CPC is committed to assisting chapters in meeting these criteria by providing training, resources and assistance.

A. The following mandatory items are required to be submitted annually to APA staff and the CPC Executive Committee to remain in good standing with APA:

- **Mission Statement**: Defines the Chapter's core function(s) or purpose(s) and should include a commitment to the providing certain enumerated services and functions to its members.
- **Development Plan**: Articulates a long-term (5 year or so) vision for the Chapter's future programs and services—the things that the Chapter wants to be able to do in future years.
- **Work Program**: Identifies specific quantifiable goals and actions for the coming year(s), based on the Mission Statement and Development Plan. The Chapter Work Program shall not exceed a four-year span and contains a listing of goals and objectives—the things the Chapter knows it is capable of accomplishing within the available resources. A Board Retreat is a best practice which can be useful in enhancing interpersonal Chapter board member relationships as well providing an opportunity to focus on building the Development Plan, Work Program and Budget.
- **Bylaws**: Chapter shall operate under a current set of bylaws. Chapters shall review their bylaws no less than once every five years and update as needed.
- **Budget**: Chapter shall adopt and follow an annual or biennial budget which is designed to implement the Chapter Work Program.
- **Financial Reporting**: Chapter shall prepare and disseminate to the membership a financial report for the previous fiscal year within 3 months of the fiscal year close.

The report shall include the identification of all sources of income as well as expenditures.

- Tax Return: Chapter shall prepare and file appropriate federal and state tax returns within the timeframe established by the tax authority for an on-time return.
- Use of "One APA" Logotype: Chapter websites, publications, contracts and communications shall be identified with the full name of the chapter as "a Chapter of the American Planning Association," and with the uniform logotype of the Association.
- Consolidated Elections: Chapters officers shall be elected on a regular basis and Chapters shall participate in the APA consolidated and coordinated election cycle; a current list of all elected Chapter officers shall be maintained with APA staff.
- Annual Report: Each chapter shall prepare an annual report to chapter members that summarizes the Chapter's activities in relation to the adopted Work Program. This gives the Chapter Executive Committee an opportunity to assess the successes and difficulties experienced during the year and to plan accordingly for next year and also provides the membership with a yardstick by which to measure their Chapter.

B. Attainment of all or most of the following elective items ensures that a Chapter is effectively serving its membership. Annually, completion or attainment of at least 4 of the elective items is required for the Chapter to be considered to be in good standing.

1. Communications: Chapters should publish and send to its members some form of communication that focuses on current information and concerns relevant to its chapter. This publication maybe in an electronic form. Each chapter will determine the most appropriate format(s) and frequency for this communication, but 3 times per year appears to be a practical minimum.
2. Membership Recruitment and Retention: The most valuable asset of every Chapter is its members. Each Chapter should have an elected or appointed position and committee whose sole charge is attracting new members and retaining existing members. Additionally, a Chapter should develop a membership recruitment and retention plan which addresses diversity, students, faculty, emerging professionals, legacy planners, mentor programs and how each membership group is engaged by the Chapter.
3. Professional Development: Providing educational opportunities for the membership is a key component to the performance of Chapters, thus, chapters should provide access to 16 hours' worth of educational opportunities to its members each year. These educational opportunities can include section events, workshops, conference sessions, brown bag lunch & learns, webinars, co-sponsoring educational opportunities relevant to the planning profession by allied organizations or any other format which delivers professional development opportunities to the membership as well as providing planning-related education to the broader community. Chapters should also consider creating a process and committee to assist eligible AICP members to be nominated to the AICP College of Fellows.

4. Planning Board Outreach: Chapters should provide support for planning board members in developing an understanding of the principles and practices of planning and opportunities to network with both planners and other planning board members. Creation of a Planning Board Development Officer position, offering special tracks for Planning Board members at Conferences and other similar actions are recommended.
5. Legislation and Policy Program: Chapters should provide opportunities for members to be informed of and participate in state and local legislative and policy issues of concern to the planning profession. At the very least, each Chapter should elect or appoint a legislative liaison and provide support for the liaison to attend and participate in the APA Policy and Advocacy Conference and National Delegate Assembly.
6. APA Leadership Meeting Participation: Chapters must send its chapter president or proxy to at least one of the two leadership meetings held in any given calendar year.
7. Chapter Annual Meeting: Chapters should hold a business meeting annually in person or via electronic communications.
8. Succession Management: Each chapter should have a plan for leadership transition to ensure the smooth transfer of experience and knowledge to new chapter leaders.
9. Awards Program: Chapters should have an awards program to recognize professional planning projects undertaken and completed within the Chapter territory. The categories within awards programs must be tailored to the needs of each Chapter and can include recognition of individuals as well as projects and plans. Whenever possible, Chapters should use awards as a way to communicate to the community at large about the value of planning.
10. National Community Planning Month: Each Chapter should use the opportunity and resources provided by National Community Planning Month to engage communities and citizens in a dialog about the value of planning to civic discourse and developing a shared vision for the future of communities. Obtaining state and local proclamations, providing specific programs and writing articles highlighting planning's value to citizens for news media outlets are all examples of successful efforts.
11. Local Great Places Program: Some Chapters have found that instituting a statewide or localized Great Places program is very beneficial for promoting planning and what planners can accomplish. Great Places programs can be easily combined with advocacy outreach efforts as elected officials rarely object to being part of positive recognition events.
12. Outreach to Youth, Students and New Professionals: Chapters should work closely with College and University Planning Programs in their area, but should also look for ways to engage K-12 youth about the value of citizen engagement and community planning. Finally, Chapters should make specific efforts to bring new planning professionals into the Chapter through mentoring, programming and representation. Mentor-match programs are a best practice which many Chapters have found to be effective and are a way to involve AICP Fellows.

Summary of Chapter Performance Criteria	
Required	Electives--Four Required
Mission Statement	Communications
Development Plan	Recruitment and Retention
Work Program	Professional Development
Bylaws	Planning Board Outreach
Budget	Legislation and Policy Program
Financial Reporting	APA Leadership Meeting Participation
Tax Return	Chapter Annual Meeting
APA Logo	Succession Management
Consolidated Elections	Award Program
Annual Report	National Community Planning Month
	Local Great Places Program
	Youth, Student and New Professional Outreach

The process for reporting is intended to not add paperwork burdens to the Chapter. The specific documents required by these criteria together with the existing reporting schedule will provide nearly all necessary reporting and it is anticipated that a simple reporting form will be developed and used as a part of regular annual chapter reporting cycle currently in place.

The goal of these criteria is not about crime and punishment; it is to set a reasonable and attainable level of performance which will ensure a quality and beneficial membership experience for all members of APA. The principle of progressive and scalable intervention will be utilized. The CPC Executive Committee has lead role to determine both compliance/non-compliance and what, if any, assistance will be provided. In general, the path may include:

- Provide assistance through mentoring—this may be an especially attractive opportunity for former CPC members with a desire to remain involved to be able to work one-on-one with a chapter
- Tailored “Performance Improvement Plan” with timeline and focused assistance
- Designated as Noncomplying—not eligible for CPC Awards or general CPC grants—until fully meeting criteria
- Targeted assistance grants to help with meeting a specific criterion or goal
- Non-compliance actions will be followed pursuant to the CPC Policies and Procedures