

# APA California

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## Strategic Plan for 2013-14

**Adopted October 2013**

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## INTRODUCTION

### Introduction and Background

This ninth edition of the APA California's Strategic Plan represents a restructured approach to develop and apply strategies that advance APA California in keeping with our Mission Statement. The purpose of this biennial Strategic Plan is to outline new initiatives and establish leading priorities for APA California to provide direction for our organization over the next two-year period.

The Strategic Plan serves as a tool to ensure that our operations and activities directly relate to and support our mission and goals. It serves as a guide to assist APA California's leaders, administrative staff, and each of the eight Sections in setting the annual budget and making key decisions. The Board of Directors and the organization are responsible for working towards and achieving the goals of this Strategic Plan.

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### How the Strategic Plan Works

This Strategic Plan represents a flexible, targeted means of securing APA California's organizational objectives. The distinguishing features of this Strategic Plan are:

1. **Mission:** The Strategic Plan attempts to focus on our organization's major reason for being - its *Mission* - and then directs its resources specifically to those tasks that will best implement the mission. The Strategic Plan provides a basis for balancing competing demands within the organization.
2. **Resource Driven:** The Strategic Plan is based upon the limitations imposed by available resources - both people and money. In this way, the Plan is designed to offer guidance in development of APA California's annual budget.
3. **Short-Term Time Horizon:** The Strategic Plan has a short-term time horizon. By describing primary organizational Strategies envisioned for a two-year period of time, the guidance offered by the Plan is relevant to current budgeting issues.
4. **Goals and Strategies:** The Goals and Strategies presented in Section III represent the "heart and soul" of the Strategic Plan. Each year, the Board should formulate its budget priorities around the successful achievement of as many Strategies as possible.

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### How the Strategic Plan is Updated

The Strategic Plan is updated by reviewing and modifying, every two years, the Mission Statement, Initiatives, and Goals and Strategies. There is a direct correlation between the Key Initiatives and the Goals and Strategies. Preparation of the updated Plan will be the

responsibility of the Chapter President and the Chapter Board of Directors, or a subcommittee of the Chapter Board of Directors. Adoption of the updated Strategic Plan requires an affirmative vote of a majority of the Board of Directors.

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### **Mission Statement**

The Mission of APA California: making great communities happen through good planning.

Toward that end, APA California will:

- Provide the **Vision and Leadership** that fosters better planning for California;
- Build public and political **Support** for sound planning; and
- Provide its members with the **Tools, Services and Support** that advance the art and science of planning.

This **Mission Statement** provides broad guidance for development and implementation of the **Strategies** contained in this Plan.

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### **Fundamental Values**

The Mission Statement reflects the underlying, fundamental values of the APA California Board of Directors. The Board members represent the breadth and geographic diversity of planning in California. These values include:

**Vision:** The creativity and foresight needed to anticipate future needs of our membership and profession, then develop a consensus-based strategy that addresses those needs.

**Leadership:** The ability to organize and command the resources necessary to implement our vision. Critical to the concept of leadership is the balancing of competing needs and interests in a manner that consistently provides the greatest good for the greatest number of our members.

**Diversity:** The expansion in the development of its leadership and its membership of both ethnic and gender diversity within the Chapter.

**Cultivate:** The development, nurturing and preservation of a grass-roots constituency, both in the profession and in the larger community, that recognizes, accepts and advocates the values of good community, regional and other planning programs.

**Tools, Services and Support:** A commitment at every level of the organization to offer our members the tools, services and support to achieve their goals. These include regular

membership services such as: a) the newsletter; b) the website c) legislative initiatives; d) participation on task forces and local review committees; e) recognition and advancement of our professional goals through comprehensive awards programs; f) a variety of continuing education AICP and certificate maintenance programs to foster professional growth; g) annual conferences for education and networking; and h) a variety of locally sponsored and produced programs in each of California's eight sections that respond quickly and effectively to member needs at the local level.

## STRATEGIC DIRECTION

The planning as a whole and planning in California has changed dramatically over the past decade as our societal priorities, and physical and regulatory environment has changed. Changes will continue to occur. APA California must stay at the forefront of trends and emerging issues so we are successfully equipping our members to be thoughtful leaders and creative problem solvers guiding our communities. We must evolve to address challenges and meet the community needs of the future. We must advance the important role of planning for better environmental, economic, and social equity outcomes.

To accomplish this, we have set forth the following key initiatives for 2013, 2014, and beyond:

**Communication:** Embed better communication to our members and to the public in everything we do.

**Leadership for Change:** Equip our members to be leaders in change management. Be innovators and risk takers.

**Promote Planning's Value:** Promote a message that focuses on the value of planning.

## GOALS AND STRATEGIES

The following Goals and Strategies directly respond to APA California's key initiatives identified above and are designed to guide the Chapter in its budgetary and task management. The Goals are intended to continue over time and guide the the Board and staff in developing the Strategies. The Strategies are designed to be viable, verifiable and specific. Progress shall be monitored by the Board at Board meetings. As strategies are completed over the two-year timeline of the Strategic Plan, they will be checked off to show implementation progress.

- GOAL 1- Generate high quality content for the website and *Cal Planner* from all Section and Chapter Board activities**
- 1.1 Enhance website functions as follows:
- Upgrade section websites with consistent branding and format
  - Request that section websites give a higher profile to APA California
  - Drive public members to APA California website
  - Target Office of Planning and Research Book of Lists and Planning Director list
- GOAL 2- Innovate to create more opportunities for the public to engage with us as an organization**
- 2.1. Make the conference Opening Reception/plenary speaker open to public
- GOAL 3- Integrate FAICP recognition into both Annual Conference and Chapter activities**
- 3.1. Establish an FAICP Studio and talk about why they received recognition
- GOAL 4- Improve the consistency of our message**
- 4.1. Internal Communication –
- Establish regular schedule for calls and follow-through
- 4.2. External Communication-
- Make the Annual Report relevant and interactive
  - Send a once-a-year post card with key dates
  - Expand availability and participation in social media
  - Create a framework for sections e.g. mind mixer website app
- GOAL 5- Enhance our profile and visibility such that APA is THE authority on planning to members, non-members we want to recruit, and other related professions/opinion leaders we want to familiarize with APA**
- 5.1. Improve message/email blast consistency, content, timing
- 5.2. Develop a challenge to highlight APA planning and offer reward
- 5.3. Identify new community-based online sources and contribute
- GOAL 6- Promote planning in the mainstream media**
- 6.1. Publish press releases on the annual Chapter Awards

- 6.2. Highlight planning that is outside of planning – e.g. Work on complete streets which is often seen as more Public Work related
- 6.3. Publish an Op Ed on “Value of Planning from a Commissioner”
- GOAL 7- Increase communication between Sections and Chapters**
  - 7.1. Conduct a survey of best practices
  - 7.2. Improve the system for sharing documents
  - 7.3. Provide sections with adequate data on new members, AICP lapsed, CM expiration, etc.
  - 7.4. Develop communication templates for use by sections
- GOAL 8- Partner with other affiliated groups – Young Planners, students, FAICP, California Planning Roundtable (CPR), California Planning Foundation (CPF)**
  - 8.1. Use resources to conduct cutting edge sessions at the Annual Conference
  - 8.2. Conduct Leadership sessions on the nuts and bolts of planning
  - 8.3. Conduct formal and informal sessions at the Annual Conference
  - 8.4. Identify future leaders for Board/sections from those sessions and leadership reception
- GOAL 9- Create specialized training at the Annual Conferences**
  - 9.1. Develop session programs on hot topics:
    - Hot topics for external communication
    - Responding to common questions and myths
    - Hot topics for profession
    - Hot topics for internal and organizational communication
  - 9.2. Consider an “Equipping Innovators” Saturday Workshop
  - 9.3. Engage more academics for cutting edge ideas
  - 9.4. Create a leadership track OR a leadership academy at the Annual Conference
  - 9.5. Create a speaker’s bureau
- GOAL 10- Cultivate leaders in planning and in APA through Section boards and activities**
  - 10.1. Leverage Section and Chapter communication tools (newsletters, websites, social media) to promote planning
  - 10.2. Increase APA CA membership through local Section and state sponsored programs, events, and membership services
- GOAL 11- Transfer Annual Conference Content to Other Formats**
  - 11.1. Transfer leading/star conference sessions to webcast on line learning network
- GOAL 12- Enhance the Profile and Visibility of California Planning Roundtable**
  - 12.1. Invite CPR session speakers and/or Special Project leads to write *Cal Planner* articles
  - 12.2. Sponsor legislation
  - 12.3. Use social media to continue CPR session topic discussions
- GOAL 13- Address justice and equity issues within the Chapter and within our communities**
  - 13.1. Conduct an Annual Conference session on disadvantaged communities planning and inequitable infrastructure
- GOAL 14- Know the APA California brand and use it**



- 14.1. Develop new messages for the public:
  - Research what other Chapters are doing for public relations – best practices
  - Create a list of values that planning promotes
  - Create a “what is planning” blurb
  - Create a media kit
- 14.2. Develop new messages for the members
- 14.3. Highlight a new planning value each month on website
- 14.4. Promote branding on APA California web site

**GOAL 15- Develop a program/template for National APA Planning Month**

- 15.1. Help cities do an enhanced version of World Town Planning Day
- 15.2. Adopt a planning campaign in cities during planning month with a model slogan – Great Places Just Don’t Happen
- 15.3. Develop a Great Places in California Award Program

**GOAL 16- Identify advocates and potential partners**

- 16.1. Identify synergies with other groups including but not limited to: AEP, ULI, AIA, ASLA, CNU, ITE

**GOAL 17- Target potential members with specialized messages**

- 17.1. Promote successes – publish small blasts with snippets
- 17.2. Show where planning adds values

**GOAL 18- Create APA California planning grant**

- 18.1. Submit proposal to promote value of good planning
- 18.2. Make it easy to apply

**GOAL 19- Include legislators in Media outreach**

- 19.1. Create a kit for the web to equip legislators and members to answer questions
- 19.2. Identify what APA is
- 19.3. Be a resource

## IMPLEMENTATION

### Annual Budgeting

This Strategic Plan focuses on our organization's major reason for being - its Mission - and then directs its resources specifically to those tasks that will best implement the mission. The Strategic Plan provides a basis for balancing competing demands within the organization.

This Strategic Plan is based upon the limitations imposed by available resources - both people and money. In this way, the Plan is designed to guide the development of APA California's annual budget. By describing primary organizational strategies envisioned for a two-year period of time, the guidance offered by the Plan is relevant to current budgeting issues.

The Strategies identified above are not prioritized in this Plan. Instead, the annual budgeting process establishes a general priority based on resources the APA California's Board chooses to devote to each Strategy.

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### Updating and Monitoring Implementation of the Strategic Plan

To maintain its relevance and provide proper guidance, the Strategic Plan is to be reviewed and updated every two years at a retreat and/or Board meeting during the first year of the incoming President. Preparation of the updated Plan will be the responsibility of the APA California President and/or a subcommittee of the APA California Board of Directors. Adoption of the updated Strategic Plan requires an affirmative vote of a majority of the Board of Directors.

The Plan is updated by reviewing and modifying, as necessary, the Mission Statement (Section II), and Goals and Strategies (Section III). Modification of the Introduction and Implementation sections (I and IV) may also be necessary to maintain updated document content and format consistency.

Implementation of the Strategic Plan Strategies shall be monitored by the Board at each Board meeting, but the specific portfolio goals and strategies are the responsibility of the Vice President or portfolio manager. While each have been specifically assigned, they are interrelated and all Board members and staff share responsibility to support and assist in their implementation. The completed Strategies shall be checked off as completed. Any items not completed within the two-year timeline of the Strategic Plan shall be reviewed by the Board at the next Strategic Plan retreat and either deleted or continued into the next two-year cycle.

A separate Work Program strategy matrix will be developed subsequent to this Plan that details each portfolio, the action items and the timeframe for completing the action item.