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**California Chapter for the American Planning Association**

**Strategic Plan 2018-2019**

The California Chapter of the American Planning Association (the Chapter) bylaws require the Chapter’s strategic plan to be updated as necessary. While the content of the strategic plan is not specifically called out in the bylaws, past strategic plans have described the vision, values, the objectives, and the responsibilities of the elected and appointed board officers and the chapter affiliates in meeting these objectives in support of the Chapter’s Mission Statement.

## 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.

The Chapter’s 2018-2019 Strategic Plan focuses has three objectives:

1. Define the vision and values of the organization and use them to guide our decisions
2. Identify both short and long term goals and actions to achieve those outcomes
3. Define activities that can be accomplished in the during the time frame of the plan that either achieve our short term objectives or advance our long term goals.

**ORGANIZATIONAL AND PROFESSIONAL VALUES**

**What do we stand for as a profession and as an organization?**

As the organization representing professional planners, National APA broadly defines the values of our profession through national initiatives, the AICP Code of Ethics, and its requirements for chapters. As the California Chapter, we are responsible for sharing those values with our members and the public. However, we also have a responsibility to our members to create a space to discuss their values and integrate them into the both the national and state organization and the practice of the profession. In the Chapter we do this through our documents: mission statement, Chapter Bylaws, the Strategic Plan; and our initiatives and actions: Young Planners Group (YPG), our section and state awards, the Diversity Summit and our section activities. We also reflect our values in the structure of our organization and how we allocate our resources. For example, we have the most robust lobbying/policy program of any of the state chapters. Our board includes Coordinator positions for Membership Inclusion, University Liaison, and Young Planners. We have Chapter Historians. and maintain an historical archive. We have several affiliated organizations formed to address specific organization values which include the California Planning Foundation, the California Planning Roundtable and the Planner Emeritus Network.

Our values and priorities are also shaped by the world around us; a context that has changed dramatically since our last comprehensive strategic plan in 2013-2014. As disruptive as these changes may seem now, their impacts will be even greater in the future. While we cannot predict the exact impacts, we must be sensitive to these changes and consider their potential impact on the future of the profession. The below reflects the professional and organization values of the Chapter and creates the framework for the strategic plan’s goals and actions. They also define a roadmap for how we sustain the profession into the future.

**Strategic Plan Guiding Values and Objectives**

***Inclusion and Diversity***

We must work to Increase the diversity of the planning profession, and the membership and leadership of our organization, to reflect the communities we serve. In our community engagement and planning efforts, we need to develop techniques to more effectively engage marginalized and under represented groups in the processes that impact their lives.

***Social and Environmental Justice***

Our activities as planners impact how communities develop, and the services and opportunities they offer their residents, ultimately affecting their quality of life. We must work to integrate equity into all we do and become advocates and educators both at at the state and local level for policy makers and community residents.

***Great Communities Are Healthy Communities***

The relationship between environmental and personal health and planning is historic. Because of the increasing emphasis on social and environmental justice, the relationship between health and planning has heated up again. Planners have embarked on a rapidly growing relationship with partners in the public health field to support the health of our communities and their residents.

***Constant Improvement of Our Planning Skills***

The APA though its certification program, AICP, is committed to maintaining the highest level of professionalism, ethical behavior and skill. With rapid innovation, especially in the technical sector, APA must dedicate itself to providing opportunities for our members to maintain and expand their skills and knowledge of planning issues, related fields, and tools.

***Taking Care of Business***

APA California is no longer a small organization; we have almost 6,000 members ( the latest chapter in the United States) and an annual budget of approximately $500,000. The administrative and fiscal aspects of the Chapter need to be run in a transparent and responsible manner and we need to ensure that we have the organizational infrastructure and capacity to serve our members and meet our current and future goals.

Strategic Plan Methodology

At the board’s Winter meeting, participants spent a day discussing the opportunities and challenges facing the organization as well as reaffirming our organizational and professional values. Seven key focus areas were identified for the span of this Strategic Plan. Committees were formed to take the discussion from the retreat and develop suggested action plans for these areas.

**Next Steps**

* Committees should review and prioritize activities based on what they can accomplish by the end of 2019.
* Committees should develop action plans for each activity with milestones, timelines
* Committees should identify responsibilities and necessary resources, both financial and time commitments, to complete activities.
* They plans are due to the board by August 1, 2018.
* The Board will review and prioritize activities based on existing resources. The Board my also determine that if resources do not exist, the Subcommittee should develop a plan to pursue the necessary resources.

Strategic Plan Focus Areas

There are seven focus areas for this strategic plan which support the organization’s values and address the current and future challenges and opportunities the organization and the profession face.

**1. Networks**

As planning becomes more foundational to addressing major issues such as climate change, housing, infrastructure, health and equity, we need to strengthen and expand our professional networks, particularly with allied organizations, nonprofits and health professionals, to increase our effectiveness and promote stronger, healthier communities. (Diverse membership)

**2. Sustainable Chapter Membership**

As an organization, we need to build our membership strategically by targeting groups that can increase our long-term sustainability and effectiveness as an organization, such as students, academics, young planners, and mid-career planners. This will require us to make strong value statements and act on these values, as well as provide meaningful membership services and engagement opportunities that give value to membership and develop new leaders at both the section and chapter levels.

**3. Organizational Diversity**

As planners, we strive to engage all segments of a community when developing plans that impact them. We strive to overcome bias and be transparent in our assumptions and hear and not judge the people that we serve. We recognize that a diverse planning profession that reflects the communities that we serve in regards to ethnicity, race, gender and age, enriches our professional practice and our personal understanding of issues. Because of this, APA California is committed to diversifying our membership and our organizational leadership at the Section, Chapter and National levels.

**4. Policy/Legislation**

APA California has become skilled at proactively advocating for good planning policy and regulations at the state level. We need to expand our effectiveness by building grassroots advocacy, working with allied affiliates, and educating and building relationships with policy makers and advocates who share our values and objectives at the local/section level, as well as the state level.

**5. Influence National APA**

As the largest state chapter in the US, with the most robust policy/legislative program, there are many opportunities for the Chapter to partner with National. This is particularly true as we develop our local advocacy and education program. California is also on the forefront of several issues including integrating health and equity into planning and planning for disruptive new technologies such as ride sharing, self driving cars, and online retail.

**6. Diversify and Stabilize Chapter Revenue Sources**

Our funding at the state level comes primarily from membership subventions and the annual conference. Sections are also funded by subventions and the conference. In addition, sections pursue sponsorships and partners. During the past recessions both membership levels and conference attendance dropped. How do we as an organization maintain our membership services and maintain operations during “bust periods”? Are there activities that are better suited for these economic challenging times or do we structure our budget and policies to be prepared for these periods? Other than organizational stability, what sorts of services would we like to provide our members? What initiatives improve our profession and our communities?

7. Organizational Sustainability **Evaluate Organizational Structure**

assess structure to see if it reflects our current situation and goals and values

**WHAT ARE THE CHALLENGES AND OPPORTUNITIES THAT YOU SEE FOR APA CALIFORNIA AND THE PLANNING PROFESSION IN THE NEXT TWO YEARS? LONG TERM?**

|  |  |
| --- | --- |
| **Challenges** | **Opportunities** |
| * Attracting/maintaining new professions * Bad news messaging * Influencing local decisions * Alternative facts – cut through the truth * Getting our message through the clutter * Not treated as professional experts * Prevent short-term action from leading to long-term guard against * Diversity/inclusion – does not reflect the communities we work in * Non-profit planners * Diversity – need to address structurally and need money to include these new members | * Post-Brown influence – RDAs * New professionals * “Big Tent” Planning * Technology-changing: engage and leverage * Post-fire legislation * Resiliency * “Thinking it Through” * Keep building chapter & section relationships: use our organization structure * More advocacy – use our influence to influence * Personal connection- individuals need to make the invitation for members to participate (invite people in)) * Mentorships * Awards – use this event to sell results and outcomes * Elections – bridge the gap * Reach out to other professions - i.e., happy hours * PAB – Planning Accreditation Boards: professional participation, inform reviewers of staff participation or non-participation |

Strategic Plan Subcommittee Activities

**Networks Subcommittee**

**Goal:** To strengthen and expand networks with specific emphasis on: (1) allied organizations, (2) non-profits, and (3) building a permanent and substantive alliance with public health professionals.

**Proposed Activities**

1. Identify allied organizations, nonprofits and public health organizations

***Existing Collaborations***

* + What organizations do we have MOU’s of collaboration with?
  + What organizations have we already worked with at both the state and section level?
  + What activities and or issues have we worked on? Best practices and Lessons learned?
  + What are the structures of the different allied organizations? State, Regional, Local
  + Do these groups have emerging professionals groups?
  + Identify what we want out of these relationships and the resources needed to collaborate

***New Collaborations***

* + - * + Identify possible shared issues such as SB 1000, GHG Reduction, 2018 Census
        + Identify existing coalitions
        + Identify outreach strategies
        + Development Standardized Tool for Communication
    - Easier coordination/discussion paths
    - Keeps history of previous discussions/actions
    - Helps with turnover of staff on both sides
    - Template, list of program suggestions
    - Needs to have a primary and secondary capability
    - What are the criteria to be included in “primary”

**Sustainable Chapter Membership Subcommittee**

**Goal:** To develop an action plan to retain existing membership and expand membership in targeted areas including:

* + Academia
  + Planning related professionals
  + Missing middle professionals
  + Diverse emerging professionals and practicing professionals in APA allied organizations
  + Planning Commissioners

**Proposed Activities**

**1. Student/New Member Retention**

* Educate about and promote APA National’s AICP Pilot Program.
* Promote student membership by working with university and student liaisons.
* Develop more programs at Section and Chapter levels about issues millennials care about, i.e. employment, housing.
* In CalPlanner, have articles, local planner interviews, young planner interviews.
* Target directors to support. There’s uneven funding in agencies to support, send to conferences, etc.
* Talk to directors or target directors. What’s value of AICP, APA? What do we have to offer?

**2. Targeted Growth**

**a. Academics**

* Reach out to and include academics/students in state and local events.
* Collaborate on events where academics share the latest research and best practices with planners and allied organizations.
* Explore reduced membership for academics.
* Continue CalPlanner academic issue.
* Reserve panel presentation slots for academics at the annual conference.
* Highlight academic award winner papers in CalPlanner.
* Promote experiential learning opportunities that bring students, academics and professionals together.

**b. Planning-Related Professionals**

* Forge relationships with affiliated organizations at local and state levels.
* Consider developing trainings/sessions centered on environmental justice with affiliated organizations.
* Look for opportunities to educate Planning commissioners and other community based organizations.
* Consider creating local vision awards at the section level and recognize all recipients at the annual conference. Potential session?

**c. Diversity**

* Explore what diversity data we can get from National.
* Explore forming other interests groups within section – i.e. Latinos in Planning, etc.
* Offer a wide range of services and events to appeal to diverse stakeholders.
* Collaborate with community organizations to identify opportunities to work with diverse stakeholders around shared issues.
* Identify opportunities to interact with elementary and high school students.

**d. Missing Middle Professionals**

* Work with CPR to make leadership training available to missing middle professionals.
* Figure out how APA’s emerging managers group can support middle professionals.
* Make sure there are conference sessions targeted toward skill/leadership development.
* Engage supervisors and directors and enlist their help in mentoring and developing emerging leaders.
* Identify skills that mid level professionals need to develop their careers.

**3. Continue to identify Strategic Sectors for Membership**

Work with the Networks and Diversity Subcommittees to identify and reach out to targeted groups. promote membership by developing an understanding of the needs of these groups.

4. **Membership Survey**

In collaboration with the sections, conduct a membership survey to determine what services/programs members value, what new services/programs they would like to see and in general how they perceive APA. Work with our University Liaisons, to extend the survey to students, academics and planners and other affiliated professionals that are not members.

**Coordination:** The Membership Subcommittee, the Chapter/Section Relationships Subcommittee and the Diversity Subcommittee, Networks Subcommittee

**Diversity Subcommittee**

**Goal:** To deepen the diversity of our membership and Chapter and Section leadership and to address the glaring inequities that impact the lives of so many in our state.

**Proposed Activities**

1. **Diversity Summit**

1. Continue holding and improving Diversity Summit.
2. Consider increasing the Diversity/Inclusion budget and/or providing a specific line item with additional resources for the Diversity Summit.

2. **Membership Inclusion Coordinators**

1. Change the bylaws to fund the participation of the Membership Inclusion Coordinators in Chapter board meetings.
2. Convene Membership Inclusion Committee to continue to advise on chapter and section programming. At least one member of this committee should serve on the Leg Review Committee.
3. Develop implicit bias training for State and Chapter Boards and to be presented at our annual conference. This should be coordinated by the Membership Inclusion Committee.

3. **Planning Advocate Nomination**

1. Continue the annual nomination of diverse Planning Advocates. (Replace this with local vision awards or equity/diversity planner or partner award)

4. **Coordinate with Sustainable Membership Subcommittee**

1. Explore what diversity data we can get from National.
2. Explore forming other interests groups within section.
3. Offer a wide range of services and events to appeal to diverse stakeholders.
4. **Coordinate with Network Subcommittee**
5. Identify organizations that we can partner with to address equity issues and reach out to potential members.

**Coordination:** Membership, Policy/Legislation, Chapter/Section

**Chapter/Section Coordination Subcommittee**

**Goal:**  To develop strategies so that the Sections and Chapter better collaborate to serve our members, and implement the goals and objectives of this Strategic Plan.

**Proposed Activities:**

1. Inventory current section and chapter programs and compare to National’s Chapter Performance Criteria. Identify cost of each program.
2. Identify opportunities for collaboration between sections and the Chapter. The following table expands upon the possible coordination of some of the common programs:

|  |  |
| --- | --- |
| **Programs** | **Coordination** |
| Universal Awards Application Form and Submittal Process | VP of Administration/Section Awards Directors Coordination |
| AICP Training Programs/Materials | VP of Professional Development/ Section AICP Directors |
| Chapter CPF Scholarship Seminar | CPF President/Section CPF Liaisons |
| Case Law/Environmental Update | VP Leg/ Section Legislative Directors |
| Statewide Partnerships w/. Allied Organizations such as ULI, AEP, etc | Chapter President/Past-President/President-Elect/Section Directors |

1. Develop process for sections to share activities with the chapter and other sections to cross promote events and activities that are of regional and statewide interest such as a shared calendar. This could include activities from allied organizations.
2. Continue Section Director monthly calls to share information and work towards implementing these action items and to identify additional ways to collaborate to provide high quality membership services.
3. As Chapter and Sections expand their programs to better serve members, there’s a greater need to acquire additional help. Investigate options for hiring state program coordinator.

**State Policy/Legislation Subcommittee**

**Goal:** To expand our effectiveness in creating great communities, supporting good planning policy and building support for the profession by working with allied affiliates, and educating and building relationships with policy makers and advocates who share our values and objectives at the local/section level, as well as the state level.

**Proposed Activities:**

1. Develop Council of Legislative Representatives to undertake Strategic Plan activity implementation.

***Council Membership***

* Section legislative representative
* National Policy Representative
* State Lobbyist
* VP for Policy & Legislation
* Legal and environmental experts from the Leg Review Team or as identified by the Council
* Representative from Membership/Inclusionary Committee

***Council Activities***

* Provide comment and feedback on State-wide policy issues on an ad hoc basis
* Assist in identifying bills for review by the Legislative Review Team
* Provide conduit for legislative and policy information, both State to Sections and Sections to State
* Assist in the preparation of biennial updates to the State-wide Legislative Platform
* Provide a conduit for legislative and policy information to/from National
* Assist in the preparation and presentation of legislative updates and outreach
* Develop and implement a training program regarding legislative advocacy

1. Develop and coordinate a grassroots planning advocacy network
2. Build stronger allied group relationships around shared issues and coordinate legislative advocacy
3. Coordinate and submit CalAPA sponsored session(s) at affiliate organization events

**Coordination:**  National, diversity, network

**National Policy and Leadership Coordination Subcommittee**

**Goal:** To increase Chapter Influence with APA National

**Proposed Activities**

1. Policy & Advocacy

a. Continue strengthening relationship between National P & A and Chapter efforts

b. CA has outstanding legislative program and lobbying; National growing grassroots network – mutual value to Chapter and National

c. What resources can National bring to policy issues in CA? 

2. Strengthen APA National presence in California

a. Add west coast office for National

b. Role and presence for National in Chapter and even Section events

c. Focus on member services and national networking 

3. 2019 National Planning Conference in San Francisco

a. Chapter leadership needs to understand role and relationship

b. Cross-promotional & coordination opportunities between NPC and Chapter Conferences

c. Leverage in-state NPC to drive Chapter membership and outreach 

4. Strengthen California’s leadership role in areas where we excel; use our influence to push National on key topics

a. Student programming and membership

b. Policy & Legislation

c. Diversity & inclusion

**Coordination:** Policy and leg, membership

**Chapter Finance Subcommittee**

**Goal:** To promote organizational stability by diversifying revenue sources while improving membership services.

**Proposed Activities**

1. Mini Conferences/One Day Events on a topic of state-wide significance

* Possible topics:
  + Climate change. Mixed used development
  + Affordable housing
  + Disaster and resiliency planning
  + General Plan Guidelines
  + Economic development
  + CEQA reform
* Possible collaborations/partnerships:
  + ULI
  + Sierra Club
  + ASLA
  + AIA
  + CNU
  + State agencies (e.g. OPR, HCD, Strategic  Growth Council)
  + Affordable housing organizations,
  + Universities
* Cross-profession events could be a membership expansion opportunity
* Involve sections in planning Chapter-level events - share revenue

2. Market Chapter Only Membership to non-planners.

* Potential rebranding with targeted marketing to:
  + Elected/appointed officials
  + Non-planners (e.g. housing professionals, transportation planners, attorneys)

3. Online Professional Development Program (pricing)

* Video record selected conference sessions (fee for non-conference attendees)
* Potential revenue sharing with session presenters
* Live webinars
* Video library
* Possible topics:
  + AICP training workshop
  + Ethics and law sessions
  + Legislation
  + New books/publications (partner with Solano Press)

4. Chapter Sponsorship Program

* Sponsorships packages with defined benefits levels
* Multi-year conference sponsorships (e.g. 3-year)
* Sponsorships for mini-conferences, one-day events, webinars and other Chapter activities

 5. Endowments/Foundations (this needs further study on determine feasibility)

* Check what is possible with our non-profit status
* Explore forming a separate non-profit entity for charitable donations to fund Chapter and Section-level community-based programs (e.g. CPAT)

**Collaboration:** Sustainable Membership, Networks

**Organizational Stability/Sustainability Subcommittee**

**Goal:** To analyze our current structure to see if it supports our values, our long and short term goals, our financial stability and our continued relevance and sustainability as an organization.

**Membership**

* Determine base level of service that APA, California Chapter should provide its members. How much does it cost to provide these services?
* Develop strategies to provide those services.
* Is our current geographic structure of Chapter, Sections, Divisions adequate to maintain membership and provide the base level of service.
* Does our current revenue sharing structure support our membership services and other goals?
* How do we communicate value for membership? Is it effective? What do our members value about their membership?

**Diversity**

* Review our programs and initiatives to make sure we are effectively integrating equity and diversity.
* Develop a Membership Inclusion Committee.
* Develop a implicit bias training for APA CA State Board and others in leadership positions, as well as members at large.
* Build stronger relationships with nonprofit groups that are looking to engage disadvantaged communities and encourage equitable engagement.

**Leadership Development**

* Are we developing the next generation of Leaders?
* Create more opportunities for involvement with APA CA.
* Develop mentorship program for new state section and board members
* Share information on section mentorship programs to develop a best practices for supporting all career levels.

**Financial Stability**

* Develop best practices for Chapter and Section accounting.
* Are we allocating our resources (both financial and time) to reflect our values and best serve our members?
* Identify initiatives or programs that we would like to find and determine the cost of these activities. What is the most effective way to fund these activities?

Appendices

Appendix 1: Coordination Matrix

Appendix 2: Committee Reports

Appendix 3: : Subcommittees

Appendix 4: Retreat Notes