

APA CALIFORNIA STRATEGIC PLAN 2018-2019

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

Networks				
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				
Lead: Marc Yeber Nick Chen	Timeline with Milestones	Activity or Task Lead/board participants/APA Partners such as YPG, Universities/ CPR or CPF, National APA	Needed Resources/ Cost	Potential Outside Partners
Activity #1: Query Sections and Chapter regarding existing partnerships and partnering activities.	2018	Section Directors & Board		
Activity #2: Identify opportunities for collaboration	2018	Professional Development Coordinators, Section Directors and Section Boards		
Activity #3: Identify shared issues such as SB 100, GHG reduction, the 2020 Census.	2018/Retreat 2019	President Elect, Chapter Inclusion Coordinators		
Activity #4: Develop outreach strategy				
Activity #5: Develop standardized communication tool.				
Future Actions after 12/2019				

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; and Planning Commissioners.				
Leads: Mary Wright Juan Borelli	Timeline with Milestones	Activity or Task Lead/board participants/APA Partners such as YPG, Universities/ CPR or CPF, National APA	Needed Resources/ Cost	Potential Outside Partners
Activity 1. Student/New Member Retention				

a. Educate about and promote APA National's AICP Pilot Program.	On-going	Chapter and Section board members.	N/A	
b. Promote student membership by working with university and student liaisons.	On-going	Chapter and local university and student liaisons.	N/A	Universities, others.
c. Develop more programs at Section and Chapter levels about issues millennials care about, i.e. employment, housing.	2019	Chapter and Section program/ professional development coordinators.	TBD	Affiliated professions.
d. In CalPlanner, have articles, local planner interviews, young planner interviews.	2019	University liaisons, Section Directors, VP Marketing/ Membership, VP Public Information	N/A	
e. Target directors to support. There's uneven funding in agencies to support, send to conferences, etc.	2019	VP Marketing/Membership, Sustainable Membership Subcommittee, CA Roundtable	N/A	
f. Talk to directors or target directors. What's value of AICP, APA? What do we have to offer?	2019	VP Marketing/Membership, Sustainable Membership Subcommittee, CA Roundtable	N/A	
2. Targeted Growth – a. Academics				
a. Reach out to and include academics/ students in state and local events.	2018/2019	Chapter and Section Directors, VP Marketing/Membership, University Liaisons, Student Liaison, CPF President	TBD	Association of Collegiate Schools of Planning
b. Collaborate on events where academics share the latest research and best practices with planners and allied organizations.	2019	University Liaisons	TBD	Association of Collegiate Schools of Planning
c. Explore reduced membership for academics.	Future	VP Marketing/Membership, University Liaisons, Chapter president	TBD	
d. Continue CalPlanner academic issue.	On-going	University Liaisons, Student Rep, VP Marketing/Membership, VP Public Information, CPF President	N/A	
e. Reserve panel presentation slots for academics at the annual conference.	2019	VP Conferences, VP Marketing/ Membership, University Liaisons	N/A	

f. Highlight academic award winner papers in CalPlanner.	2019	University Liaisons, VP Marketing/Membership, VP Public Information	N/A	
g. Promote experiential learning opportunities that bring students, academics and professionals together.	Future	University Liaisons, Student Rep, VP Marketing/Membership, VP Professional Development	TBD	
2. Targeted Growth – b. Planning-Related Professionals				
a. Forge relationships with affiliated organizations at local and state levels.	On-going	Chapter and Section Board Members	N/A	
b. Consider developing trainings/sessions centered on environmental justice with affiliated organizations.	2019	VP Professional Development	TBD	Affiliated organizations TBD
c. Look for opportunities to educate Planning Commissioners and other community based organizations.	Future	Commissioner and Board Representative	TBD	Planning Commissioners and other community based organizations.
d. Consider creating local vision awards at the section level and recognize all recipients at the annual conference. Potential session?	Future	Chapter and Section Directors, VP Administration, Award Coordinators	TBD	
2. Targeted Growth – c. Diversity				
a. Explore what diversity data we can get from National.	2019	VP Marketing/Membership, Inclusion Coordinators	N/A	
b. Explore forming other interests groups within section – i.e. Latinos in Planning, etc.	2019	Section directors, Inclusion Coordinators, APA National Divisons.	N/A	
c. Offer a wide range of services and events to appeal to diverse stakeholders.	On-going	Section and Chapter Board Members.	TBD	
d. Collaborate with community organizations to identify opportunities to work with diverse stakeholders around shared issues.	On-going	Section and Chapter Board Members	TBD	

e. Identify opportunities to interact with elementary and high school students.	Future	TBD	TBD	
2. Targeted Growth – d. Missing Middle Professionals				
a. Work with CPR to make leadership training available to missing middle professionals.	2019	VP Professional Development, CPR	TBD	
b. Figure out how APA's emerging managers group can support middle professionals.	2019	VP Professional Development	TBD	
c. Make sure there are conference sessions targeted toward skill/leadership development.	2019	VP Conferences, VP Professional Development	TBD	
d. Engage supervisors and directors and enlist their help in mentoring and developing emerging leaders.	Future	VP Marketing/Membership, VP Professional Development	TBD	
e. Identify skills that mid level professionals need to develop their careers	Future	VP Marketing/Membership, VP Professional Development	TBD	
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.	On-going	Chapter Board Members	TBD	
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.	2019	Chapter President, Section, Directors, VP Professional Development, VP Marketing/ Membership, University Liaisons, Student Liaison	TBD	

Future Actions after 12/2019	2.a.c, 2.a.g, 2.b.c, 2.b.d, 2.c.e, 2.d.d, 2.d.e			
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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.				
Leads: Mary Wright Miroo Desai	Timeline with Milestones	Activity or Task Lead/board participants/APA Partners such as YPG, Universities/CPR or CPF, National APA	Needed Resources/ Cost	Potential Outside Partners
Activity 1. Diversity Summit				
Subtask a. Continue holding and improving Diversity Summit.	On-going	Chapter & Section Inclusion Coordinators, Local Host Committee, VP Marketing & Membership	See Item 1.b, below.	Varies
Subtask b. Consider increasing the Diversity/ Inclusion budget and/or providing a specific line item with additional resources for the Diversity Summit.	Partially completed	APA CA Board, Chapter Inclusion Coordinators, VP Marketing & Membership	Funding for Diversity speaker stipends has been provided by the Board as outlined in attached memo from Hanson Hom. Additional resources are desired for Diversity Mixer.	Private sponsors
Activity 2. Membership Inclusion Coordinators				
Subtask a. Change the bylaws to create a stand-alone, elected and funded Vice-President position for to increase diversity in our profession, and membership and leadership of our organization	In process	APA CA Board, Chapter Inclusion Coordinators, VP Marketing & Membership	TBD	

Subtask b. 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.	TBD		TBD	https://www.nyplanning.org/group-page/diversity/
Subtask c. Develop implicit bias training for State and Section Boards and to be presented at our annual conference. This should be coordinated by the Membership Inclusion Committee.	TBD	Inclusion Coordinators, VP Conferences and Marketing & Membership	TBD	https://www.nyplanning.org/events/categories/committees/diversity/
Activity 3. Planning Advocate Nomination				
Subtask a. Continue the annual nomination of diverse Planning Advocates. (Replace this with local vision awards or equity/diversity planner or partner award).	On-going.	Chapter & Section Inclusion Coordinators	None	Varies
Activity 4. Coordinate with Sustainable Membership Subcommittee				
Subtask a. Explore what diversity data we can get from National.	2018/2019	Chapter Inclusion Coordinators, VP Marketing & Membership		
Subtask b. Explore forming other interests groups within section.	2018/2019	Section Inclusion Coordinators		
Subtask c. Offer a wide range of services and events to appeal to diverse stakeholders.	2018/2019	APA CA Board, Chapter & Section Inclusion Coordinators, VP Marketing & Membership		
Activity 5. Coordinate with Network Subcommittee				
Subtask a. Identify organizations that we can partner with to address equity issues and reach out to potential members.	2018/2019	APA CA Board, Chapter & Section Inclusion Coordinators, VP Marketing & Membership, Network Committee Chair		
Future Actions after 12/2019				

Chapter/Section Coordination

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.

Leads: Rachel Hurst Sharon Grewall	Timeline with Milestones	Activity or Task Lead/board participants/APA Partners such as YPG, Universities/CPR or CPF, National APA	Needed Resources/Cost	Potential Outside Partners
Activity				
1. Inventory current section and chapter programs and compare to National's Chapter Performance Criteria.	Inventory completed by Section Directors in Summer 2018. Comparison to National Criteria to be completed by December 2018. Note: I deleted line re: identifying cost of each program.	National APA to provide National Criteria. Comparison to be completed by Board subcommittee.		
2. Identify opportunities for collaboration between sections and the Chapter such as the following common programs:				

Universal Awards Application Form and Submittal Process	By beginning of 2019 or 2020 awards cycle?	VP of Administration/Section Awards Directors Coordination	Forms should be available on Chapter website and applications and materials should be able to be uploaded to a common storage location Chapter to advise whether Google or other free forms are acceptable; if not, web programming resources are required	
AICP Training Programs/Materials	By 2020 AICP exam prep cycle	Working group of VP of Professional Development, Section PDOs/AICP reps with support from professional design/editing staff	Shared materials should be made available on Chapter website, exam prep activities/ sessions/ schedule should be posted on shared calendar Cost of professional design/editing staff TBD	
Chapter CPF scholarship seminar	2019 scholarship cycle	CPF President/Section CPF liaisons	Web cast Seminar should be available on Chapter website	
Annual Case Law/ Environmental updates	Annually – starting in 2019	VP Legislation/ Section Leg reps	If web only, technical support may be needed. If live events, travel & event planning budget is needed	

Statewide Partnerships w/. Allied Organizations such as ULI, AEP, etc		Chapter President/Past-President/President-Elect/Section Directors		
3. 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.	Chapter website to host shared calendar to which section events and activities can be posted. Should be established by January 2019.	Chapter staff, webmaster? With VP of Professional Development	Don't know if additional resources are needed or not	
4. 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.	Ongoing.	SD Executive Committee members and Section Directors		
5. 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	June 2019 Milestones: 1. Subcommittee to identify desired tasks & roles for this position - by November 2018 2. Assess hours required and capacity of current Chapter staff - by December 2018 3. Seek funding in 2019 approved budget 4. Implement and/or hire by June 2019	Chapter staff, VP Professional Development, SD subcommittee	Funding for staff/consultant hours	
Future Actions after 12/2019				

State Policy & Legislation

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.

Lead: John Terrel	Timeline/Milestones	Activity/Task Leader Participants	Needed Resources/ Cost	Potential Outside Partners	Status
1. Council of Legislative Representatives					
a. Convene Council	Jun-18	VP Policy & Leg Council	N/A	N/A	Complete
b. Establish Charter	Jun-18	VP Policy & Leg Council	N/A	N/A	Complete
c. Prepare Legislative Platform for 2019-20 Leg Session	Oct-18	VP Policy & Leg Council	N/A	N/A	In progress
2. Chapter/Section advocacy training					
a. Convene training team	Sep-18	Stefan George Incoming President	N/A	N/A	Scheduled
b. Prepare training program	Sep-18	Stefan George Incoming President Ashley Atkinson VP Policy & Leg	N/A	N/A	Pending
c. Present program @ State conference	Oct-18	Team	N/A	N/A	Scheduled
d. Review & revise program	Nov-18	Team	N/A	N/A	Pending
e. Disseminate program Plan future training	Nov-18	Team Council	N/A	N/A	Pending
3. Stronger National/Chapter/Section Connection					
a. Participate in National Policy discussions	On Going	President National Policy Rep VP Policy & Leg	N/A	N/A	On Going
b. Disseminate National/State Policy information	On Going	President National Policy Rep VP Policy & Leg Council Leg Review Team	N/A	N/A	On Going
c. Provide venue for Section Information to be shared	On Going	Council Section Directors	N/A	N/A	On Going

d. Attend National Policy Conference	Sep-18	President National Policy Rep	\$1,250/year NPR travel	N/A	Scheduled
e. Disseminate NPC info	Oct-18	National Policy Rep Council	N/A	N/A	Pending
4. Stronger allied group relationship					
a. Identify and reach out to potential partners	2019	VP Policy & Leg Stefan George	N/A	League of CA Cities CSAC CALBO	Future
b. Draft joint letters on legislation	On Going	Stefan George Senior Council	N/A	League of CA Cities CSAC	On Going
c. Develop policy for partnerships	2019	VP Policy & Leg Board	N/A	N/A	Future
5. CALAPA sponsored sessions @ Cal League of Cities conf					
a. Reach out to League	2019	VP Policy & Leg	N/A	League of CA Cities	Future
b. Develop program	2019	VP Policy & Leg	N/A	League of CA Cities	Future
6. Grassroots planning advocacy network					
a. Increase flow of information to Council and Leg Review	On Going	VP Policy & Leg Council Leg Review Team	N/A	N/A	On Going
b. Identify outreach opportunities	2019	VP Policy & Leg Council Leg Review Team	N/A	N/A	Future

National Policy and Leadership Coordination

Goal: To increase Chapter Influence with APA National.

Leads: Pete Parkinson Kristn Asp	Timeline with Milestones	Task Lead & APA Partners	Resources or Cost	Potential Outside Partners	Status
1. Strengthen relationship between National Policy & Advocacy and Chapter Efforts					
a. Participate in Chapter Presidents Council Policy & Advocacy Committee	April 2017	Chapter President	N/A	N/A	Complete & ongoing
b. CA National P & A rep to attend National P & A conference	September 2018	Board & VP Policy & Lg	Approx \$2,000/year	N/A	Nick Maricich will attend in 2018; Board should consider budgeting for attendance in future years
c. Use CA Chapter experience/expertise to aid National and other Chapters to develop state advocacy programs	Summer 2018	Chapter President, National Rep, lobbyists	N/A	N/A	Ongoing
2. Strengthen National Presence in CA					
a. Propose west coast office for National	Summer 2019	Chapter President & National Board Reps	unknown		Pending
b. Increase National Presence at Chapter events	October 2018 & ongoing	Chapter President, VP Conf	N/A	National Board	APA president, Director of Education & Asst Editor of <i>Planning</i> magazine will be at Chapter conference
c. Leverage new APA Learn platform to enhance Chapter PD offerings	December 2019	Board, VP Prof Dev	unknown	National staff	APA CA task force formed to provide recommendations re APA Learn; National Director of Education will be at 2018 conference
3. 2019 NPC in San Francisco					

a. Actively participate in NPC Committee activities	April 2017	Local Host Subcommittee, Chapter Pres	N/A	N/A	Participation ongoing since LHC appointed in 2017; Chapter President now attends NPC Committee meetings
b. Promote Chapter Conference at NPC	April 2019	Local Host Subcommittee	unknown	N/A	Pending
c. Host Chapter reception at NPC & use to drive membership & outreach	April 2019	Local Host Subcommittee & Board	\$5,000	N/A	Pending. Expenditure requires Board approval.
4. Use “largest chapter” influence to push National on key issues					
a. Policy & legislation with focus on housing	December 2018	Chapter Pres, Nat Leg Rep, VP P&L, lobbyists	N/A	N/A	Ongoing; Chapter President appointed to National’s “Planning Home” steering committee. See also Item #1
b. Establish/strengthen relationship with National Student Representatives Council (SRC), highlighting diversity/inclusion and young planner involvement	June 2019	Chapter President, Student Rep, VP Membership	N/A	SRC	Pending

Finance Subcommittee: Diversify Chapter Revenue

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

Leads: Sung Kwon Hanson Hom	Timeline with Milestones	Activity or Task Lead/ board participants/APA Partners such as YPG, Universities/CPR or CPF, National APA	Needed Resources/Cost	Potential Outside Partners
Activity #1: Create Finance Committee with wide range of financial experience and expertise				
Activity #2: Hep develop distance learning program in coordination with sections and APA LEARN				
Activity #3: Develop mini conferences or roundtables of statewide significance		CPR, Sections		
Activity #4: Research Foundation Grant Funding to expand member services				
Activity #5: Develop chapter sponsorship program				
Future Actions after 12/2019				

Organizational Structure/Sustainability Subcommittee

Goal: To analyze our current structure and resource allocation 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.

Leads: Julia Lave Johnston Pete Parkinson	Activities	Subcommittee Crossover	Potential Outside Partners
Networks Identify organizations that share our mission and values. How can we partner with them to better accomplish our goals?	2018	Networks Diversity Policy & Leg Chapter/Section	

1. Focus on Housing, 2020 Census, SB1000 and SGMA	2019		
2. Develop relationships with other West Coast APA Chapters to produce programming to meet underserved members.	2018-19		Oregon, Washington, Nevada, Colorado Chapters
Membership Examine the structure of our State to make sure that we are supporting our members and giving them value for their membership.		Membership Diversity Financial Stability Policy & Leg Chapter/Section	
1. Determine base level of service that APA California should provide to members.	2018		
2. What structural of financial changes do we need to make to provide those services?	Distance Learning Program		
3. Clearly articulate value for membership. What do our members value about their membership?	Membership Survey, Focus groups		
4. Develop programming that reflects our values	Work with networks, Policy & Leg		
5. Empower our sections to develop the next generation of APA and community leaders but supporting mentorship programs and leadership development programs in all the sections.	Section Mentorship and Leadership Programs Under represented Planner Workshops		
6. Work with National Divisions to provide additional member services and meet members professional interests.			
Diversity & Inclusion Increase the the diversity of our membership and Chapter and Section leadership.	New board position Map current diversity in State and look at existing membership patterns to determine where we should be putting resources.	Membership Policy & Leg Chapter/section	
1. Build relationships with advocacy groups to develop understand of planning and SB1000. Provide guidance for our members.	Work with Networks		OPR, Census
2. Develop a community advocacy program that allows sections to build relationships with community advocacy groups.	Workshop at Conference continue in 2019		

3. Create a Diversity Committee using NY Metro Chapter as an best practice.	2019		
4. Hold APA CA leadership Equity Training	2019		
5. Future Actions after 12/2019			
6. Hold a HindSight Equity Conference using NY Metro Chapter as an best practice.	2020		
Chapter & Section Coordination			
1. Work with Membership to determine base level of membership services	2018		
2. Identify coordination opportunities between section and the chapter that can save money around programming and administration	2108		
3. Investigate opportunities with APA LEARN	2018-19		
4. Work with State to identify best mentorship practices.	2019		
5. Participate in Section Board Diversity Training	2019		
6. Investigate chapter and section options for geographic or fiscal restricting to meet base level membership services.	2019		
7. Determine cost hire a state level program coordinator to ensure that all members are receiving the determine base level of value.	2019		
State Policy and Leg Committee			
1. Develop State advocacy program	2018		
2. Determine how to implement and fund state advocacy program	2019		
3. Work with Sections to better distribute and engage membership around legislative platform	2018-19		

National Policy and Leadership			
1. Propose West Coast office or West Cost Project Manager to National to increase presence on West Coast.			
2. Leverage APA Learn platform to share California's strengths including diversity, Climate Change, etc.			
3. Use CA Chapter experience/expertise to aid National and other Chapters to develop state advocacy programs			
Diversify Chapter Revenue			
1. Create Finance Committee with wide range of financial experience and expertise	2019		
2. Develop mini conferences or roundtables of statewide significance			
3. Research Foundation Grant Funding to expand member services			
4. Develop chapter sponsorship program			