



## American Planning Association California Chapter Strategic Plan 2019-2020

### **Strategic Plan Goals**

- 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.
- 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 by provide meaningful membership services and engagement opportunities that give value to membership at all levels of our members' careers into retirement.
- Deepen the diversity of our membership and Chapter and Section leadership, and educate planners and decision makers about the embedded inequities that impact the lives of so many in our state.
- Develop strategies so that the Sections and Chapter better collaborate to serve our members, and implement the goals and objectives of this Strategic Plan.
- Increase Chapter Influence with APA National.
- Promote organizational stability by diversifying revenue sources to invest in improving membership services and increasing value for membership.
- 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.

2019 Projects	
<b>Project 1.1</b> <b>Develop Clear Chapter Policy Document</b>	<b>Board Lead:</b> Eric Phillips, VP Policy & Legislation
<b>Outcomes 2019:</b> <ul style="list-style-type: none"> <li>March 1: Have one page handout, two sides <ul style="list-style-type: none"> <li>Side 1: APA CA Overview</li> <li>Side 2: Housing</li> </ul> </li> <li>Develop a maximum of four handouts. explaining platform priorities to the public.</li> <li>Schedule targeted outreach day to state legislators and policy makers with Sande George, APACA President &amp; VP of Policy and Leg.</li> </ul> <b>Resources Needed:</b> <ul style="list-style-type: none"> <li>Leverage existing resources.</li> </ul>	<b>Working Group Members:</b> <ul style="list-style-type: none"> <li>Pete Parkinson, Past President</li> <li>Julia Lave Johnston, Chapter President</li> <li>Sande George</li> <li>Lauren De Valencia y Sanchez</li> <li>Ashley Atkinson, LA Section Director</li> <li>Additional Section Director</li> <li>CPR Rep</li> </ul>
<b>Project 1.2</b> <b>Support CA APA Sections in Local Advocacy</b>	<b>Board Lead:</b> Eric Philips, VP Policy & Legislation
<b>Outcomes 2019:</b> <ul style="list-style-type: none"> <li>Ongoing: Monthly Section Director Calls and monthly policy directors calls.</li> <li>Immediate: Connect Sections to Sande George</li> <li>Summer 2019: Create guidelines for appropriate advocacy options that address: <ol style="list-style-type: none"> <li>Outreach to state legislators and state initiatives.</li> <li>How sectors can effectively reach out to local decision makers and engage in local initiatives without overstepping APA National and State requirements.</li> <li>Identify how sections can support the Chapter's activities.</li> </ol> </li> </ul> <b>Resources Needed:</b> <ul style="list-style-type: none"> <li>Use existing resources.</li> </ul>	<b>Working Group Members:</b> <ul style="list-style-type: none"> <li>Julia Lave Johnston, Chapter President</li> <li>Section Directors</li> <li>Section Policy Directors</li> </ul>

<b>Project 1.3</b> <b>Develop and Support YPG &amp; Mentorship Program In All Sections</b>	<b>Board Lead:</b> Mary Wright, VP for Marketing and Membership
<b>Outcomes 2019:</b> <ul style="list-style-type: none"> <li>• Immediate: Appoint new Young Planner Coordinator.</li> <li>• Immediate: Restart Young Planner Coordinator monthly call with all Section YPG Leadership.</li> <li>• Create YPG's in the two sections with out programs.</li> <li>• Collect all Sections YPG documents for consolidation and draw from National to update original handbook.</li> <li>• Chapter-wide discussion to decide consistent naming for YPG going forward.</li> <li>• Develop menu of types of mentorship programs for sections to choose from include existing mentorship program practices in the sections.</li> </ul> <b>Resources Needed:</b> <ul style="list-style-type: none"> <li>• Identify resources needed by the two sections who need to start YPG programs.</li> </ul>	<b>Working Group Members:</b> <ul style="list-style-type: none"> <li>• Young Planner Coordinator</li> <li>• Kristin Castro, Board Student Representative</li> <li>• Richard Kos, University Liaison, N. Cal</li> <li>• Mirle Rabinowitz, University Liaison, S. Cal</li> <li>• Julia Lave Johnston, Chapter President</li> <li>• John Hildebrand, Inland Empire Section Director</li> <li>• Central Section Director</li> <li>• YPG Section Representatives</li> </ul>
<b>Project 2.1</b> <b>Develop a Business Plan to Create an Online Planning Commissioners Training Program</b>	<b>Board Lead:</b> Jay Higgins, Commission and Board Representative
<b>Outcomes 2019:</b> <ul style="list-style-type: none"> <li>• Develop Business Plan</li> <li>• Conduct financial feasibility study</li> </ul> <b>Resources Needed:</b> <ul style="list-style-type: none"> <li>• Resources identified in the business plan including funding and capacity.</li> </ul>	<b>Working Group Members:</b> <ul style="list-style-type: none"> <li>• Greg Konar, Distance Education Director</li> <li>• Sharon Grewal, VP of Professional Development</li> <li>• Julia Lave Johnston, Chapter President</li> <li>• Section PDOs</li> <li>• Section Planning Commissioner Liaisons</li> <li>• Planetizen content developer</li> <li>• APACA Legal Advisor</li> <li>• National APA Education Director</li> <li>• Sande George</li> </ul>

<b>Project 2.2</b> <b>Create a Database of Existing and Potential Partners</b>	<b>Board Leads:</b> Marc Yeber, VP for Public Information
<b>Outcomes in 2019:</b> <ul style="list-style-type: none"> <li>• Searchable database on website (higher capacity) or spreadsheet list (lower capacity) of organizations and contacts that the section and chapter.</li> <li>• Create section and/or chapter level liaison position.</li> <li>• Database maintenance plan.</li> </ul> <b>Resources Needed:</b> <ul style="list-style-type: none"> <li>• Sections and Chapter to contribute to provide organizations and contacts for database.</li> <li>• Web developer for database creation.</li> <li>• Funding for development and maintenance.</li> </ul>	<b>Working Group Members:</b> <ul style="list-style-type: none"> <li>• Section Directors</li> <li>• Section PDOs</li> </ul>
<b>Project 2.3</b> <b>Form Committee to Develop Recommendations on How the APACA Can Collaborate with Potential Partner Organizations</b>	<b>Board Lead:</b> Julia Lave Johnston, Chapter President
<b>Outcomes in 2019:</b> <ul style="list-style-type: none"> <li>• May Board Meeting: Report to Board on research results and recommendations.</li> </ul> <b>Resources Needed:</b> <ul style="list-style-type: none"> <li>• Cooperation from Section Directors</li> </ul>	<b>Working Group Members:</b> Jay Higgins, Commission and Board Representative Ben Kimball, Past Central Section Director Ashley Atkinson, LA Section Director Dan Amsden, Sac Valley Sponsorship Coordinator San Diego Section Director
<b>Project 3.1</b> <b>Create a Toolkit for Section Director Diversity Directors</b>	<b>Board Lead:</b> Miroo Desai
<b>Outcomes in 2019:</b> <ul style="list-style-type: none"> <li>• 2020 Board Retreat: Draft Toolkit presentation to board.</li> </ul>	<b>Working Group Members:</b> <ul style="list-style-type: none"> <li>• Section Diversity Directors</li> <li>• Two Section Directors</li> </ul>

<b>Resources Needed:</b> <ul style="list-style-type: none"> <li>• Commitment of time from Board VP of Diversity and Equity and Section Diversity Directors.</li> <li>• Dedicated location on website.</li> <li>• Best practices research.</li> </ul>	<ul style="list-style-type: none"> <li>• Miguel Vasquez</li> <li>• CPR Reps</li> <li>• Advocacy groups</li> </ul>
<b>Project 3.2</b> <b>Establish Diversity and Inclusion Leader in Every Section with Defined Duties/Responsibilities</b>	<b>Board Lead:</b> Miroo Desai
<b>Outcomes in 2019:</b> <ul style="list-style-type: none"> <li>• Establishment of Diversity and Inclusion Leader in each section.</li> </ul> <b>Resources Needed:</b> <ul style="list-style-type: none"> <li>• Outreach from Board to Sections.</li> <li>• Create sample section bylaws update to include new section position.</li> <li>• Tool Kit to establish duties/responsibilities.</li> </ul>	<b>Working Group Members:</b> <ul style="list-style-type: none"> <li>• Section Directors</li> <li>• Section Diversity Directors</li> </ul>
<b>Project 3.3</b> <b>Add Diversity and Equity Section to Chapter Website</b>	<b>Board Lead:</b> Miroo Desai, VP for Diversity and Equity & Marc Yeber, VP of Public Information
<b>Outcomes in 2019:</b> <ul style="list-style-type: none"> <li>• Develop new section on CA APA website that includes Handbook, contacts for section Diversity Directors, links to National diversity committee and resource list.</li> </ul> <b>Resources Needed:</b> <ul style="list-style-type: none"> <li>• Content</li> <li>• Funding for Web Master.</li> </ul>	<b>Working Group Members:</b> <ul style="list-style-type: none"> <li>• Section Diversity Directors</li> </ul>
<b>Project 3.4</b> <b>Create Process for Establishing Baseline to Evaluate Diversity in Membership and Leadership</b>	<b>Board Lead:</b> Miroo Desai
<b>Outcomes in 2019:</b> <ul style="list-style-type: none"> <li>• Data on baseline sector diversity.</li> </ul>	<b>Working Group Members:</b> <ul style="list-style-type: none"> <li>• Mary Wright, VP of Membership and Marketing</li> </ul>

<ul style="list-style-type: none"> <li>• Change Chapter only membership form to collect demographic information.</li> </ul> <p><b>Resources Needed:</b></p> <ul style="list-style-type: none"> <li>• National APA data base demographic information.</li> <li>• Demographic information from state only members.</li> <li>• Support form Laura Murphy.</li> <li>• Collaboration from National APA Diversity Committee.</li> </ul>	<p>marketing</p> <ul style="list-style-type: none"> <li>• Two Section Directors</li> <li>• Laura Murphy</li> </ul>
<p><b>Project 3.5</b>  <b>Create Diversity, Equity and Inclusionary Trainings for APA CA</b>  <b>Outcomes in 2019:</b></p> <ul style="list-style-type: none"> <li>• Identify partners to develop training in collaboration.</li> <li>• Offer training to all sections and at conference.</li> </ul> <p><b>Resources Needed:</b></p> <ul style="list-style-type: none"> <li>• Funding to develop and offer trainings.</li> </ul>	<p><b>Board Lead:</b> Miroo Desai  <b>Working Group Members:</b></p> <ul style="list-style-type: none"> <li>• Julia Lave Johnston, Chapter President</li> <li>• Section Diversity Directors</li> </ul>
<ul style="list-style-type: none"> <li>• Diverse emerging professionals and practicing professionals in APA allied organizations</li> <li>• Planning Commissioners</li> </ul> <p>4.3 Determine base level of service we should provide to members.</p> <p>4.4 Identify the structural and financial changes we need to make to provide those services.</p> <p>4.5 Improve Chapter and Section communications and coordination.</p> <p>4.6 Clearly articulate membership value.</p> <p>4.7 Develop programming that reflects our values.</p>	<ul style="list-style-type: none"> <li>• Identify what services sections are providing members.</li> <li>• Document annual CM credits the sections offer and at what price for members.</li> <li>• Develop a best section practices manual that includes National Chapter requirements.</li> <li>• Provide board training to all Chapter and Section Board Members.</li> <li>• Develop strategic sponsorship package the includes programs as well as conferences.</li> </ul>

<p>4.8 Empower our sections to develop the next generation of APA and community leaders by supporting mentorship programs and leadership development programs in all the sections.</p>	
<p><b>Project 4.1</b> <b>Outreach to Members &amp; Prospective Members</b></p>	<p><b>Board Lead:</b> Mary Wright, VP for Marketing and Membership &amp; Marc Yeber, VP for Public Information</p>
<p><b>Outcomes in 2019:</b></p> <ul style="list-style-type: none"> <li>• Conduct membership surveys or use already existing surveys if conducted in the last year.</li> <li>• Identify way to survey nonmembers- reach out to list of partners/contacts.</li> <li>• Identify pathways/conduits to high school students- including existing programs run by similar organizations.</li> <li>• Reimagine newsletter.</li> <li>• Develop processes to improve Chapter/Section information sharing.</li> <li>• Document existing communication methods used by sections including newsletters, Facebook, LinkedIn, Instagram etc. Include timelines.</li> <li>• Develop marketing materials.</li> </ul>	<p><b>Working Group Members:</b></p> <ul style="list-style-type: none"> <li>• Sharon Grewal, VP for Professional Development</li> <li>• Kristin Castro, Board Student Representative</li> <li>• Richard Kos, University Liaison, N. Cal</li> <li>• Mirle Rabinowitz, University Liaison, S. Cal</li> <li>• Two Section Directors</li> <li>• Section Membership Representatives</li> </ul>
<p><b>Resources Needed:</b></p> <ul style="list-style-type: none"> <li>• Identify survey software.</li> <li>• Help from contacts/contact list.</li> </ul>	
<p><b>Project 4.2</b> <b>Expand Distance Learning Program</b></p>	<p><b>Board Lead: Sharon Grewal, VP for Professional Development</b></p>
<p><b>Outcomes in 2019:</b></p> <ul style="list-style-type: none"> <li>• Develop MOUs with Planetzien and APALearn.</li> <li>• Identify section recording/live streaming capabilities.</li> <li>• Train Sections on recording/live streaming programs</li> <li>• Hold three statewide live streaming distance learning opportunities.</li> </ul>	<p><b>Working Group Members:</b></p> <ul style="list-style-type: none"> <li>• Greg Konar, Distance Education Coordinator</li> <li>• Derek Wong, VP for Administration</li> <li>• Section Professional Development Directors</li> </ul>

<p><b>Resources Needed:</b></p> <ul style="list-style-type: none"> <li>• Funding for equipment and trainings.</li> <li>• Expanded statewide program delivery capacity.</li> </ul>	<ul style="list-style-type: none"> <li>• Two Section Directors</li> </ul>
<p><b>Project 4.3</b> <b>Hire Contract Programs Staff</b></p>	<p><b>Board Lead:</b> Derek Wong, VP of Administration &amp; Julia Lave Johnston, Chapter President</p>
<p><b>Outcomes in 2019:</b></p> <ul style="list-style-type: none"> <li>• Develop job description. Includes determining tasks by coordinating with section directors.</li> <li>• Determine pay rate.</li> <li>• Resolve logistics: who does staff report to? Where will they work? Etc.</li> <li>• Develop funding strategy.</li> </ul>	<p><b>Working Group Members:</b></p> <ul style="list-style-type: none"> <li>• Sharon Grewal, VP for Professional Development</li> <li>• Section Directors</li> <li>• Sande George</li> <li>• Lauren De Valencia y Sanchez</li> </ul>
<p><b>Resources Needed:</b></p> <ul style="list-style-type: none"> <li>• Funding</li> <li>• Completion of outcomes.</li> </ul>	