



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 2019-20 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 professional and organizational values of the Chapter that follow create 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 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 important inter relationship between health and planning is being rediscovered. 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 through 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.

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.

Initiative #1	Proposed Benchmarks or Activities	Board
<p>1. Finding our Voice: Speaking Up for Planning</p> <p>1.1 Nurture the next generation of APA and Community Leaders.</p> <p>1.2 Advocate statewide and nationally for diversity and inclusion in our organization and the planning process.</p> <p>1.3 Support our members in local, regional, state advocacy.</p> <p>1.4 Clearly articulate our values and the purpose and impact of planning on the quality of people's lives.</p> <p>1.5 Continue to provide a strong voice for good planning policy at the state level.</p> <p>1.6 Provide leadership at the National level by supporting other chapters in developing legislative programs.</p>	<ul style="list-style-type: none"> • Establish YPG in every section. • Establish mentorship programs in every section. • Increase outreach and engagement to elementary, middle and high schools. • Develop Planning Commissioner Certificate Program. • Build stronger relationships with Universities and professors potentially funding research. (APA organization survey) • Develop tools and programming that supports sections in local advocacy efforts and in building relationships with local policy makers and local advocacy groups. • Develop clear Chapter Policy Document and hand out materials. • Develop a state lobbying day- on partnership with other like organizations/ CPR. • Create online material or webinars for other chapters looking to establish advocacy programs. 	<p>Lead: VP Policy & Leg Eric Phillips</p> <p>Pete Parkinson Kristen Asp Ashley Atkinson Lauren De Valencia y Sanchez Sande George</p>

2019 Projects

Project 1.1

Develop Clear Chapter Policy Document

Board Lead: Eric Phillips, VP Policy & Legislation

Outcomes 2019:

- March 1: Have one page handout, two sides
 - Side 1: APA CA Overview
 - Side 2: Housing
- Develop a maximum of four handouts. explaining platform priorities to the public.
- Schedule targeted outreach day to state legislators and policy makers with Sande George, APACA President & VP of Policy and Leg.

Resources Needed:

- Leverage existing resources.

Working Group Members:

- Pete Parkinson, Past President
- Julia Lave Johnston, Chapter President
- Sande George
- Lauren De Valencia y Sanchez
- Ashley Atkinson, LA Section Director
- Additional Section Director
- CPR Rep

Project 1.2

Support CA APA Sections in Local Advocacy

Board Lead: Eric Philips, VP Policy & Legislation

Outcomes 2019:

- Ongoing: Monthly Section Director Calls and monthly policy directors calls.
- Immediate: Connect Sections to Sande George
- Summer 2019: Create guidelines for appropriate advocacy options that address:
 1. Outreach to state legislators and state initiatives.
 2. How sectors can effectively reach out to local decision makers and engage in local initiatives without overstepping APA National and State requirements.
 3. Identify how sections can support the Chapter's activities.

Resources Needed:

- Use existing resources.

Working Group Members:

- Julia Lave Johnston, Chapter President
- Section Directors
- Section Policy Directors

Project 1.3 Develop and Support YPG & Mentorship Program In All Sections	Board Lead: Mary Wright, VP for Marketing and Membership	
Outcomes 2019: <ul style="list-style-type: none"> • Immediate: Appoint new Young Planner Coordinator. • Immediate: Restart Young Planner Coordinator monthly call with all Section YPG Leadership. • Create YPG's in the two sections with out programs. • Collect all Sections YPG documents for consolidation and draw from National to update original handbook. • Chapter-wide discussion to decide consistent naming for YPG going forward. • Develop menu of types of mentorship programs for sections to choose from include existing mentorship program practices in the sections. Resources Needed: <ul style="list-style-type: none"> • Identify resources needed by the two sections who need to start YPG programs. 	Working Group Members: <ul style="list-style-type: none"> • Young Planner Coordinator • Kristin Castro, Board Student Representative • Richard Kos, University Liaison, N. Cal • Mirle Rabinowitz, University Liaison, S. Cal • Julia Lave Johnston, Chapter President • John Hildebrand, Inland Empire Section Director • Central Section Director • YPG Section Representatives 	
Initiative #2	Benchmarks	Board
2. Building Strong Relationships to Make Great Communities Happen 2.1 Identify organizations that share our mission and values. 2.2 Identify strategic partnerships that strengthen our organization and help us reach our goals. 2.3 Build stronger relationships with the communities we serve. Examples: 2020 Census; Housing and Homelessness; Climate Change; Land Use and Water; SB 1000; Autonomous Vehicles; and Public Health.	<ul style="list-style-type: none"> • Identify which organizations sections and chapters are currently working with. • Develop outreach program/education for Planning Commissioners and other appointed and elected officials. Could include: <ul style="list-style-type: none"> • 101 Commissioner Training • Advanced (102) Commissioner Training • Regional Convening • Commissioner Tract at Conference • Supervisor Vetting • Training Incentives 	Lead: Boards & Commission Rep: Jay Higgins John Hildebrand James Castenada Mary Wright Alicia Brown

	<ul style="list-style-type: none"> • Continue to work with APHA on healthy communities re the Plan 4 Health Initiative. • Consider formalizing affiliate organization liaison positions. 	
2019 Projects		
Project 2.1 Develop a Business Plan to Create an Online Planning Commissioners Training Program	Board Lead: Jay Higgins, Commission and Board Representative	
Outcomes 2019: <ul style="list-style-type: none"> • Develop Business Plan • Conduct financial feasibility study Resources Needed: <ul style="list-style-type: none"> • Resources identified in the business plan including funding and capacity. 	Working Group Members: <ul style="list-style-type: none"> • Greg Konar, Distance Education Director • Sharon Grewal, VP of Professional Development • Julia Lave Johnston, Chapter President • Section PDOs • Section Planning Commissioner Liaisons • Planetizen content developer • APACA Legal Advisor • National APA Education Director • Sande George 	
Project 2.2 Create a Database of Existing and Potential Partners	Board Leads: Marc Yeber, VP for Public Information	
Outcomes in 2019: <ul style="list-style-type: none"> • Searchable database on website (higher capacity) or spreadsheet list (lower capacity) of organizations and contacts that the section and chapter. • Create section and/or chapter level liaison position. • Database maintenance plan. Resources Needed: <ul style="list-style-type: none"> • Sections and Chapter to contribute to provide organizations and contacts for database. • Web developer for database creation. • Funding for development and maintenance. 	Working Group Members: <ul style="list-style-type: none"> • Section Directors • Section PDOs 	

Project 2.3 Form Committee to Develop Recommendations on How the APACA Can Collaborate with Potential Partner Organizations	Board Lead: Julia Lave Johnston, Chapter President	
Outcomes in 2019: <ul style="list-style-type: none"> • May Board Meeting: Report to Board on research results and recommendations. Resources Needed: <ul style="list-style-type: none"> • Cooperation from Section Directors 	Working Group Members: 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	
Initiative #3	Benchmarks	Board
3. Planning for an Equitable Future 3.1 Increase the the diversity of our membership and Chapter and Section leadership. 3.2 Build relationships with advocacy groups to develop understand of planning and SB1000. Provide guidance for our members. 3.3 Develop a community advocacy program that allows sections to build relationships with community advocacy groups.	<ul style="list-style-type: none"> • Appoint New Vice President for Diversity and Equity. • Create a Diversity Committee using NY Metro Chapter as a best practice. • Hold a HindSight Equity Conference using NY Metro Chapter as an best practice. • Hold APA CA leadership Equity Training • Coordinate with National Diversity Committee. • Coordinate with APA National Social Equity Task Force. 	Lead: VP Diversity & Equity Miroo Desai Juan Borelli (A) Rachel Hurst Ellie Fiori Nick Chen Kai Lord Farmer
Projects 2019		
Project 3.1 Create a Toolkit for Section Director Diversity Directors	Board Lead: Miroo Desai	
Outcomes in 2019: <ul style="list-style-type: none"> • 2020 Board Retreat: Draft Toolkit presentation to board. 	Working Group Members: <ul style="list-style-type: none"> • Section Diversity Directors • Two Section Directors 	

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

<p>Outcomes in 2019:</p> <ul style="list-style-type: none"> • Data on baseline sector diversity. • Change Chapter only membership form to collect demographic information. <p>Resources Needed:</p> <ul style="list-style-type: none"> • National APA date base demographic information. • Demographic information from state only members. • Support form Laura Murphy. • Collaboration from National APA Diversity Committee. 	<p>Working Group Members:</p> <ul style="list-style-type: none"> • Mary Wright, VP of Membership and Marketing • Two Section Directors • Laura Murphy 	
<p>Project 3.5 Create Diversity, Equity and Inclusionary Trainings for APA CA</p> <p>Outcomes in 2019:</p> <ul style="list-style-type: none"> • Identify partners to develop training in collaboration. • Offer training to all sections and at conference. <p>Resources Needed:</p> <ul style="list-style-type: none"> • Funding to develop and offer trainings. 	<p>Board Lead: Miroo Desai</p> <p>Working Group Members:</p> <ul style="list-style-type: none"> • Julia Lave Johnston, Chapter President • Section Diversity Directors 	
Initiative #4	Benchmarks	Board Lead
<p>4. I HEART APA CA: Sustaining Our Organization</p> <p>4.1 Examine the structure of our State to make sure that we are supporting our members at all stages of their careers and giving them value for their membership.</p> <p>4.2 Develop an action plan to retain existing membership and expand membership in targeted areas including:</p> <ul style="list-style-type: none"> • Academia Planning related professionals • Missing middle professionals 	<ul style="list-style-type: none"> • Expand distance leaning program with two goals: <ul style="list-style-type: none"> • Reach all of our members • Fund a programs staff person • Identify opportunities to hire a statewide program staff member. • Develop external communications program • Conduct a membership survey. Hold member focus groups. 	<p>Lead: VP Professional Development: Sharon Grewal VP Admin: Derek Wong Bob Largomarsino Hanson Hom Marc Yeber Rachel Raynor Chris Williamson Raul Tovar Gonzalez</p>

<ul style="list-style-type: none"> • Diverse emerging professionals and practicing professionals in APA allied organizations • Planning Commissioners <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> <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>	<ul style="list-style-type: none"> • Identify what services sections are providing members. • Document annual CM credits the sections offer and at what price for members. • Develop a best section practices manual that includes National Chapter requirements. • Provide board training to all Chapter and Section Board Members. • Develop strategic sponsorship package the includes programs as well as conferences. 	
2019 Projects		
Project 4.1 Outreach to Members & Prospective Members	Board Lead: Mary Wright, VP for Marketing and Membership & Marc Yeber, VP for Public Information	
Outcomes in 2019: <ul style="list-style-type: none"> • Conduct membership surveys or use already existing surveys if conducted in the last year. • Identify way to survey nonmembers- reach out to list of partners/contacts. • Identify pathways/conduits to high school students- including existing programs run by similar organizations. • Reimagine newsletter. • Develop processes to improve Chapter/Section information sharing. • Document existing communication methods used by sections including newsletters, Facebook, LinkedIn, Instagram etc. Include timelines. • Develop marking materials. 	Working Group Members: <ul style="list-style-type: none"> • Sharon Grewal, VP for Professional Development • Kristin Castro, Board Student Representative • Richard Kos, University Liaison, N. Cal • Mirle Rabinowitz, University Liaison, S. Cal • Two Section Directors • Section Membership Representatives 	

Resources Needed: <ul style="list-style-type: none"> • Identify survey software. • Help from contacts/contact list. 	
Project 4.2 Expand Distance Learning Program	Board Lead: Sharon Grewal, VP for Professional Development
Outcomes in 2019: <ul style="list-style-type: none"> • Develop MOUs with Planetzien and APALearn. • Identify section recording/live streaming capabilities. • Train Sections on recording/live streaming programs • Hold three statewide live streaming distance learning opportunities. Resources Needed: <ul style="list-style-type: none"> • Funding for equipment and trainings. • Expanded statewide program delivery capacity. 	Working Group Members: <ul style="list-style-type: none"> • Greg Konar, Distance Education Coordinator • Derek Wong, VP for Administration • Section Professional Development Directors • Two Section Directors
Project 4.3 Hire Contract Programs Staff	Board Lead: Derek Wong, VP of Administration & Julia Lave Johnston, Chapter President
Outcomes in 2019: <ul style="list-style-type: none"> • Develop job description. Includes determining tasks by coordinating with section directors. • Determine pay rate. • Resolve logistics: who does staff report to? Where will they work? Etc. • Develop funding strategy. 	Working Group Members: <ul style="list-style-type: none"> • Sharon Grewal, VP for Professional Development • Section Directors • Sande George • Lauren De Valencia y Sanchez
Resources Needed: <ul style="list-style-type: none"> • Funding • Completion of outcomes. 	