APPENDIX A~~H~~
Site Selection Criteria for Conference Site

Section/Proposed Location/Venue:

Criteria Category	Yes	No	Explanation
Has the host Section indicated an ability and willingness to be the conference host Section for this conference			
Does site allow for ~~1,000-1,400~~1,400-1,800 attendees			
Does location meet the North/South rotation			
In Sections where there are multiple locations that are viable conference sites, is this location different than where the last conference in this Section was held			
Is the location Affordable			
Location:			
Can the facility provide lodging on site or can off site lodging provide at least ~~400~~500 hotel rooms for the peak nights			
Does the location provide variety of transportation options to conference site/area (air, train, bus)			
Does the location provide a density of lodging within walking distance to facility			
Does location provide accessibility for conference attendees to go off site for meals, entertainment			
Facility:			
Does the facility have 1000-1200 seat ballroom			
Does the facility provide 10-12 classrooms for session block offerings (preferred several that can seat 300-400 and others 100 seats each; minimum 80 seats each)			
Can the facility provide Exhibit space of 5000-7000sf			
Is the Exhibit space well-located in relationship to the session rooms to allow normal traffic to pass through the Exhibit space			
Does the Facility have 27,000-32,000sf to accommodate sessions and activities			
Does the facility have Sustainability Programs			
Membership:			
Is there adequate density of APA membership near venue (proximity to site often drives attendance numbers)			
Is site easy for students to arrive at			
Will location attract membership to attend			

PROVIDE OVERALL Recommendation to BOARD

APPENDIX B

RECOMMENDED CONFERENCE HOST COMMITTEE STRUCTURE/ROLES AND RESPONSIBILITIES

Section Director (serves as Liaison to APA California Board and may serve as Conference Co-Chair)

Conference Host Committee Co-Chairs
- Assist with development of Conference budget and overall management of conference
- Ensure conference theme and logo are selected
- Master scheduling of conference host committee responsibilities
- Ensures check list/ make sure things get done
- Provide assistance to Conference Host Committee subcommittees, as necessary
- Meeting Agendas and minutes for Conference Host Committee meetings
- Forwards minutes of CHC meetings to VP Conferences and Conference Management Contractor
- Coordination during conference
- Coordination with APA California Board via VP Conferences and Conference Management Contractor
- Coordination with Conference Host Section Board
- Maintain contact list (emails, cell phones) of all CHC members
- Assist with conference publicity by identifying local or statewide press outlets that would be interested receiving a Press Kit and information about award winners, keynote speakers, or unique conference sessions; work with Chapter to confirm legitimacy of any request for a 'Press Pass'.

Programs Subcommittee
- Identify Conference tracks which should follow theme and logo
- Develop "Call for Presentations"
- Solicit session ideas
- Review sessions and ensure 20% of sessions selected reflect host section selection
- Assist with developing program/time slot for sessions
- Keynote Speaker ideas
- Coordinate with VP Conferences or designee to ensure mandatory Board sessions are included in the Program

Student Programs Subcommittee
- Work with Student Representative on the Chapter Board to outline the 'Free Student Day' program and social activities
- Develop a series of educational sessions attractive to students
- Provide support to CPF for Student Luncheon as requested
  Work with the universities and programs subcommittee to inform students of the conference opportunities and to encourage their attendance

Sponsorships and Exhibitors Subcommittee
- Work with Conference Management Contractor in conjunction with VP Conferences, Sponsors Concierge, and Conference Host Section
- Appoint local sponsorship/exhibitor contact (2+ individuals who will be trained and will coordinate with the VP Conferences or VP Public Information to solicit sponsorships)

Special Events Subcommittee
- Opening Reception (Coordinate with Conference Management Contractor)

Mobile Workshops Subcommittee
- Coordinate with Programs Subcommittee and Conference Management Contractor who will arrange transportation
- Work with CM Credit Management Contractor to assure MWs submitted for CM credit in a timely manner

Volunteers Subcommittee
- Chair to coordinate with Conference Management Contractor to determine needs and assignments, include monitoring meal events and assisting with the sale of CPF raffle tickets.

Diversity Subcommittee
- Works with the Membership Inclusion Director on the Diversity Summit, as needed, and to assure that sessions addressing diversity are included in the conference program.

Publicity Subcommittee
- Coordinate and prepare publicity and promotional materials for the conference, including email blasts to membership, articles and ads in the Cal Planner, and social media publicity (e.g. conference Facebook, LinkedIn and Twitter accounts).
- Assemble and prepare articles for the Cal Planner conference issue.

Sustainability Subcommittee (Optional)
- Coordinates with Conference Manage~~rment Contractor~~ and conference facility to provide a "green conference" to the extent feasible as needed: often can be handled exclusively by Conference Coordinator Consultant since hotels and conference facilities employ sustainability principles that are easily obtainable and put into the conference program.

Conference Manager ~~Contractor~~ and other contractors to the APA California Chapter – see <mark>Appendices C & D</mark>
- To be included in all CHC calls and works as extension of CHC
- Direct liaison with conference facility for food/beverage and meeting space assignments (pre-conference and on-site)
- Direct liaison with A/V company
- Direct liaison with registration company, transportation company and vendors for conference related materials/updates
- Direct liaison with Graphic Designer for conference materials/updates

All conference contractors must be provided opportunity to be included in CHC calls. Regular calls must be held on a monthly basis between the CHC Co-Chairs and the conference contractors. Key subcommittee chairs may be included as needed. The CHC Co-Chairs shall conduct separate regular meetings or calls with subcommittees.

Appendix C: Chapter and CHC Responsibilities

Oct-19

Task	VP of Conferences	Conference Contractors	Conference Host Committee
Conference Theme and Logo	Obtain Board approval	Design and graphic support	Establish theme and logo
Call for Sessions	Consult and review	Prepare final document and publicize	Draft content and publicize
Session Selection	Provide guidance; oversee guaranteed/by-right sessions; coordinate review by VP Professional Development	Manage Proposal Submittal System; notification of accepted/rejected sessions; communication with session moderators; obtain AICP CM credits	Select recommended sessions; develop sessions to fill subject matter gaps
Pre-Conference Sessions	Lead responsibility to identify and recruit sessions	Prepare flyer; assist with logistics	Provide input on suggested topics and sessions
Student Day/Other Activities	Consult and review	Administrative support as needed	Lead in developing sessions and activities
Mobile Workshops	Consult and review	Prepare flyer; assist with logistics; arrange transportation as needed	Lead in developing and soliciting mobile workshops
Sponsorship Program	Consult and review; manage complimentary tables	Prepare sponsorship brochure; layout exhibitor booths and tables; process invoices and obtain sponsor logos	Set income goal; establish sponsorship packages; market program and obtain commitments
Conference Facility	Provide direction and input	Negotiate contract and facility set up; contract and direct A/V and exhibitor contractors; arrange	Provide direction and input
Opening Reception	Consult and review	Manage contracts; provide administrative support	Select location, define event and provide direction
Luncheon and Other Special Events	Consult and review	Manage contracts; provide administrative support	Select location, define events and provide direction
Awards Ceremony	Coordinate with VP Administration and Awards Program Coordinators	Administrative support as needed	n/a

CPF Student Luncheon and Reception	Coordinate with CPF Board	Arrange food/beverages; administrative support as needed	n/a
Keynote Speakers	Obtain Board approval	Publicize; administrative support as needed	Recruit speakers
Diversity Summit	Consult and review	Publicize; administrative support as needed	Diversity Committee organizes event; coordinate with Inclusion Membership Director
Conference-at-a-Glance	Consult and review	Provide draft template; prepare Conference-at-a-Glance document	Prepare Draft Glance - populate with sessions and events
Conference Program	Consult and review	Prepare Conference Program for posting	Select sessions and assign to session blocks and rooms
Cal Planner Articles	Support as needed	Publication support in Cal Planner	Prepare articles
Social Media	Support as needed	Administrative support as needed	Manage Facebook and Twitter conference sites
Registration	Oversee registration setup	Chapter liaison to registration contractor	Provide input
Website	Oversee website setup, organization, and content	Chapter liaison to website contractor; design and post content	Provide content
Mobile App	Oversee mobile app setup	Chapter liaison to mobile app contractor; load content	Provide input
Post-Conference	Oversee Conference Wrap-Up Report; oversee final conference budget; prepare post-conference survey	Administrative support on post-conference tasks	Provide content for Conference Wrap-Up Report

Appendix D: Summary of Contractor Responsibilities*

(revised: October 2019)

	Deene Alongi	ATEGO Resources	GranDesigns	New Horizon Enterprises	Simply Bookkeeping
Contractor Firm	Deene Alongi	ATEGO Resources	GranDesigns	New Horizon Enterprises	Simply Bookkeeping
Contractor Name	Deene Alongi	Francine Farrell	Dorina Blythe	Laura Murphy	Laura Dee
Primary Role	Conference management	Administrative and accounting services	Conference branding, graphic design, publications	Program sessions administration	Conference Bookkeeping
GENERAL:					Process deposits and payments
Pre-conference facilities planning	Site evaluation assistance; communication, negotiation and administration of contracts with convention center, hotels and event venues		Conference site maps		
Budget	Financial advise and support; assist with budget preparation; management of conference events and facilities	Sponsor invoices			Receive conference income; process all conference expenses and reimbursements
Conference website	Website management		Graphics support		
Registration	Lead for registration support; liaison with registration contractor	Registration oversight at conference	Graphics support	APA/AICP membership list	
Publicity	Website postings; email blasts to APA members; (CHC manages Facebook and Twitter)		CalPlanner items (e.g. Glance, Chapter newsletter ad series, conference issue)		
Mobile App	Mobile App management		Graphics support	Program sessions content	
Conference Program	Content review for facility requirements		Website posting; Document preparation	Program sessions content	

Contractor Firm	Deene Alongi	ATEGO Resources	GranDesigns	New Horizon Enterprises	Simply Bookkeeping
Contractor Name	Deene Alongi	Francine Farrell	Dorina Blythe	Laura Murphy	Laura Dee
AICP CM certification				Certification administration	
Giveaways (e.g. lanyard, pen, bag, etc.)	Oversight		Graphic design and ordering		
Signage	Oversight		Design, production, ordering		
On-site Management	Setup registration booth, Exhibit Service Provider, A/V, signs, giveaways; operations oversight; volunteers coordination; facilities liaison; staff oversight	Onsite sponsor concierge; registration support	On-site registration		
Post-conference administration	Closed out contracts; assist in preparation of final budget (income & expense report); evaluation and recommendations	Distibute conference survey; post recordings on Chapter website			Prepare final budget statement (income & expense report); reconciliation of expenses as needed; distribute conference profit

Contractor Firm	Deene Alongi	ATEGO Resources	GranDesigns	New Horizon Enterprises	Simply Bookkeeping
Contractor Name	**Deene Alongi**	**Francine Farrell**	**Dorina Blythe**	**Laura Murphy**	**Laura Dee**
COMMITTEES:					
Programs					
Call for Presentations (CFP)	Review conference capacity for sessions	Post CFP on website; send emails to APA members	Prepare CFP information and application	Update online Proposal Submittal System (PSS); provide CHC training	
Review and Selection of Presentations				Manage online PSS; update online scoring module; distribute session moderator notices; provide Excel file of accepted sessions	
Conference-at-a-Glance	Assist CHC on room assignments and setup	Post Glance on website	Prepare Glance and submit to CalPlanner		
AICP CM credits, including law and ethics			Insert credits into session descriptions	Create certification forms; submit completed forms to APA National; compile list of AICP CM sessions	
Conference Program	Review conference program	Post on website	Prepare conference program for posting	Create Word document of accepted sessions; review program drafts for accuracy	

Contractor Firm	Deene Alongi	ATEGO Resources	GranDesigns	New Horizon Enterprises	Simply Bookkeeping
Contractor Name	Deene Alongi	Francine Farrell	Dorina Blythe	Laura Murphy	Laura Dee
Sponsorship					
Exhibitor Booths/Tables Layout	Develop layout of exhibitor booths and tables with hotel/convention center	Post map on website	Prepare and update exhibitor map		
Sponsorship Brochure		Post SP brochure on website; send emails to APA members	Prepare SP brochure and submit to CalPlanner		
Sponsorship Management	Assist with booth placement in exhibit hall	Invoice/collect sponsorship fees; register sponsors; post sponsor information on website; respond to	Collect and manage sponsor logos; prepare thank you listings; prepare sponsors display for conference		Process payments
Special Events/Opening Reception					
Opening Reception - caterers, entertainment and others	Assist CHC on event planning and budgeting; negotiate and administer contracts; provide transportation as needed	Publicize on website; coordinate insurance needs	Prepare information for publicity as needed		Process deposits and payments
Plenaries, CPF Auction, Consultants Reception	Work with CHC and facility on room assignments, setup, food and costs	Publicize on website	Prepare information for publicity as needed	Obtain AICP CM credits for plenaries	

	Deene Alongi	ATEGO Resources	GranDesigns	New Horizon Enterprises	Simply Bookkeeping
Contractor Firm	Deene Alongi	ATEGO Resources	GranDesigns	New Horizon Enterprises	Simply Bookkeeping
Contractor Name	Deene Alongi	Francine Farrell	Dorina Blythe	Laura Murphy	Laura Dee
Mobile Workshops					
Publicity		Post announcements on website (CHC posts on Facebook and Twitter); send emails	Prepare mobile workshops announcement for posting		
Registration		Oversees setting up registration			
Planning	Assist with food, budgeting and other logistics; contract for transportation (charter buses)	Coordinate insurance requirements		Obtain AICP CM credits for applicable workshops	
Student Programs					
Student Sessions	Assist with room assignments and setup	Post information on website	Prepare description for publicity as needed	Support as needed	
Student Luncheon	Assist with facility needs, setup, food and cost	Post information on website	Prepare description for publicity as needed		
Student Mixer	Assist on logistics if on conference site	Post information on website	Prepare description for publicity as needed		
Volunteers					
Prior to conference	Assist CHC to define required volunteers and duties	Post recruitment information on website	Prepare recruitment flyer		
At conference	Lead liaison with CHC Volunteer Coordinator	Oversee volunteers at registration			

Contractor Firm	Deene Alongi	ATEGO Resources	GranDesigns	New Horizon Enterprises	Simply Bookkeeping
Contractor Name	Deene Alongi	Francine Farrell	Dorina Blythe	Laura Murphy	Laura Dee
Diversity					
Diversity Summit	Work with CHC and facility on room assignment and setup	Post information on website	Prepare event information as needed	Obtain AICP CM credits	
Planner-of-Color/Diversity Mixer	Assist CHC on location if within hotel/convention center	Post information on website	Prepare event information as needed		

Page 6 of 6

* The information contained in this table is not intended to be all-intensive.

Revised: October 2019

Appendix E
American Planning Association, California Chapter
Proposed Conference Budget Template
_____ Conference (based on _____ registrations)

ITEM	Chapter Budget Items (Conference budget details shown in gray)	No. or %	Unit Cost	Total Cost	Notes
	INCOME ITEMS				
	Conference Registration (4600):				
4600.1	Full Registration (Members & Non-Members)	68%	$575	0	Insert projected attendance
4600.2	Full Registration (Speakers)	8%	$450	0	Registration fees are current rates.
4600.3	Full Registration (Students)	3%	$150	0	Registration breakdown is based on
4600.4	Full Registration (Young Planners)	9%	$375	0	historic patterns.
4600.5	One-Day Registration (Members & Non-Members)	7%	$375	0	
4600.6	One-Day Registration (Speakers)	2%	$300	0	
4600.7	One-Day Registrations (Students)	2%	$50	0	
4600.8	One-Day Registrations (Young Planners)	1%	$300	0	
4600.9	Mobile Workshops				
4600.10	Guest Tickets				
4600.11	Pre-Conference Sessions		$80		
4600	TOTAL Conference Registration Income			0	
	Conference Sponsorships (4700):				
4710	Exhibit Booth/Event Sponsorship Packages (4710):				
4711	Opening Reception		$7,000	0	Complete per Sponsorship Brochure
4712	Conference Give-Away		$8,000	0	
4713	Conference Lanyards		$12,000	0	
4714	Opening Keynote		$4,000	0	
4716	Awards Ceremony		$3,000	0	
4717	Mobile App		$3,000	0	
4718	Student Awards Luncheon		$2,500	0	
4719	Continental Breakfast		$2,500	0	
4720	Closing Keynote		$2,500	0	

ITEM		Value 1	Value 2	Total	Notes
4721	CPF Reception	$3,000		0	
4722	Diversity Summit	$2,500		0	
4723	Hotel Key	$8,000		0	
4724	Custom Package			0	
4710	**Total Exhibit Booth & Event Sponsorship Packages**			**0**	
4725	**Special Events (4725):**			**0**	
4726	Student Orientation/Walking Tour	$500		0	Insert Mobile Workshops sponsors
4727	Opening Reception/Keynote	$2,000		0	
4728	Awards/CPF Auction/Closing Keynote/Diversity Summit	$1,500		0	
4729	Student Awards/YPG Mixer/Diversity Mixer	$500		0	
	Afternoon Break	$500		0	
4725	**Total Special Events**			**0**	
4737	**Public Agencies**	$1,000		0	
4738	**Non-Profit Organizations**	$500		0	
	Advertising (4740):			0	
4741	Conference Pen			0	
4743	Mobile Application		$1,000	0	
4744	Program Sponsors			0	
4745	Other Advertising			0	
4740	**Total Advertising**			**0**	
4700	**TOTAL Conference Sponsorships (75% of total)**			**0**	
4800	**TOTAL Misc. Conference Income**			**0**	
	TOTAL INCOME			**0**	
	Less Chapter Income			**0**	
	ADJUSTED TOTAL INCOME			**0**	
ITEM	**EXPENSE ITEMS**				
	Conference Management (5106):				
5106.1	Conference Management Contractor				Deene Alongi + commission adjustment
5106.2	Reimbursable Travel & Incidental Expenses				Assumes three site trips plus one for travel director.
5106.3	Onsite Conference Staffing	$3,750		0	Typically 3 contract assistants
5106	**TOTAL Conference Management (Contract)**			**0**	

Code	Description		Notes
5107	Conference Registration (Contract)		Registration hosting contract, including techincial support
	Operations/Miscellaneous (5110):		
5110.1	Hotel Rooms (conference)	0	Conference cost for complimentary hotel rooms
5110.2	Volunteer Stipends		Registration reimbursements for registered student volunteers
5110.3	ASCAP		Assume $500
5110.4	Other Expenses		
5110	TOTAL Operations/Miscellaneous	0	
5115	Speaker Fees and Expenses		Allow $1,500 each for Opening Keynote, Closing Keynote, and Diversity Summit
5120	Insurance		Assume $3,000
5145	Office Supplies		Assume $100
5150	Phone, Fax and Postage		Assume $100
5175	Credit Card Fees	0	Assume 2.5% of total registration
5180	Conference Registration/Sponsor Support (Contract)		ATEGO Resources
5185	Conference Program/AICP CM Support (Contract)		New Horizon Enterprises
5520	Design Services (Contract)		GranDesigns
5521	Proofreader (Contract)		Carol Malin
5620	Accounting/Tax Services (Contract)		Simply Bookkeeping
6261	Committee Meals & Expenses		CHC Meeting expenses
	Conference Opening Event (6400):		
6400.1	Facility Charge/Rental Fee		May or may not be a charge
6400.2	Food		Assume 70-to 80% attendance
6400.3	Beer and Wine		Complimentary drink tickets
6400.4	Transportation		Shuttle bus to on-site event if needed
6400.5	Entertainment		Live music
6400.6	Furniture Rental		Table, chairs, etc.
6400.7	Fencing		If needed
6400.8	Paper Goods		If not included with caterer
6400.9	Other Expenses		e.g. lighting, permits

| Code	Description	Qty	$	Value	Notes
6400	TOTAL Conference Opening Event	900	$ -	0	Guide: Recent events have planned for about 900 attendees
	Other Events - Food & Beverage (6420):				
6420.1	Chapter Board Meeting (breakfast/lunch)	45		0	Typically light breakfast and buffet lunch.
6420.2	Pre-Conference Sessions	50		0	Assume a total of 50 persons for two workshops.
6420.3	Student Awards Luncheon	135		0	Assume a plated luncheon
6420.4	Planning Commission Breakfast	60		0	Assume an upgraded continental breakfast
	Breakfasts/Coffee Service:				
6420.5a	Day One - Coffee Service Only	600		0	Estimated attendance figures, but
6420.5b	Day Two - Breakfast	800		0	confirm each year
6420.5c	Day Three -Breakfast	800		0	
6420.5d	Day Four -Breakfast	600		0	
6420.5	Total Breakfasts/Coffee Service			0	
6420.6	Lunch Event(s)	900		0	Guide: Recent events have planned for about 900 attendees
6420.7	Afternoon Breaks	900		0	Assumes two afternoon breaks (2nd and 3rd conference days)
6420.8	CPF Auction	400		0	Guide: Recent events have planned for about 400
6420.9	Consultants Reception	600		0	Guide: Recent events have planned for about 600
6420.10	Other Food & Beverage Expenses			0	Insert misc. food and beverage costs here
6420	TOTAL Other Events - Food & Beverage			0	
	Conference Facility Expenses (6450):				
6451	Exhibitor Services Provider (contract)				TotalExpo contract
6452	Meeting Rooms - Facility Space Fee (contract)				To be determined by Conference Manager
6453	Audio/Visual (contract)				MilMedia Productions contract
	Other Facility Expenses (6454):				

Code	Description	Amount	Notes
6454.1	Internet/Electrical/Rigging		Includes riggins for general session room/hard-wired internet for registration and CPF auction.
6454.2	Security		Contract security services for duration of conference
6454.3	Signage		On-site registration, information and direction signs
6454	Total Other Facility Expenses	0	
6450	TOTAL Conference Facility Expenses	0	
6460	**Publicity Materials (6460):**		
6466	Conference Give-Away Item		Optional: If CHC wants to provide to attendees
6467	Lanyards		
6468	Printing Costs		Misc. production and printing costs
6460	**TOTAL Publicity Materials**	0	
6470	**Mobile Workshops (6470):**		
6471	Transportation		Generally cost for chartered buses
6472	Food & Beverage		For mobile workshops that provide lunch, but can also include snacks for all.
6473	Other Expenses		Misc. expenses
6470	**TOTAL Mobile Workshops**	0	
6480	**Social Media (6480):**		Misc. expenses here
6481	Website:		
6481.1	Website Contract (per Contract)		Website hosting contract, including technical support
6481.2	Website Support (per Contract)		ATEGO Resources
6481	**Website**	0	ATEGO Resources
6482	Mobile App:		
6482.1	Mobile App Hosting (per Contract)		ATEGO Resources
6482.2	Mobile App Support (per Contract)		New Horizon Enterprises
6482	**Mobile App**	0	
6480	**TOTAL Social Media**	0	
6205	**VP Conference Expenses**		Per Chapter budget

TOTAL EXPENSES		
Less Chapter Expenses	0	Chapter Board meeting & Pre-Conference Sessions
ADJUSTED TOTAL EXPENSES	0	
NET INCOME	0	
PROFIT MARGIN (20-25% Guideline)	#DIV/0!	

Jan-20

To be inserted by CHC Co-Chairs
To be inserted by VP Conferences
To be inserted by Conference Manager
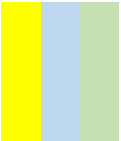
American Planning Association, California Chapter
Statement of Activity by Class
January - December 2019

	Total
Revenue	
4300 Miscellaneous Income	1,079.22
4600 Registration	701,525.00
4700 Sponsorships	
4710 Exhibit Booth & Event Sponsorship Packages	
4711 Opening Reception	28,000.00
4712 Conference Give-Away	
4713 Conference Lanyards	10,000.00
4714 Opening Keynote	24,000.00
4716 Awards Events	9,000.00
4717 Mobile App	6,000.00
4718 Student Awards Luncheon	7,500.00
4719 Continental Breakfast	10,000.00
4720 Closing Keynote	7,500.00
4721 CPF Auction	3,000.00
Total 4710 Exhibit Booth & Event Sponsorship Packages	$ 105,000.00
4725 Special Events	
4727 $1,500	3,000.00
4728 $1,000	5,000.00
4729 $500	3,000.00
Total 4725 Special Events	$ 11,000.00
4730 Event Sponsor	
4733 Mobile Workshop	2,000.00
4735 Afternoon Break	500.00
4736 Diversity Summit	2,500.00
Total 4730 Event Sponsor	$ 5,000.00
4737 Public Agency	3,000.00
4738 Non-Profit Organization	1,500.00
4739 Tabletop Sponsor	0.00
Total 4738 Non-Profit Organization	$ 1,500.00
4740 Advertising	
4741 Conference Pen	1,000.00
4743 Mobile Application	5,000.00
4744 Program Sponsors	750.00
4745 Other (Customizable)	16,000.00
Total 4740 Advertising	$ 22,750.00
Total 4700 Sponsorships	$ 148,250.00
4900 Interest Income	
4905 Checking Account	14.82

Total 4900 Interest Income	$	14.82
Total Revenue	$	850,869.04
Gross Profit	$	850,869.04
Expenditures		
5100 Operations Expense		
5106 Conference Management		66,772.72
5106.1 Travel		3,120.25
Total 5106 Conference Management	$	69,892.97
5110 Operations/Miscellaneous		8,559.64
5120 Insurance Expense		2,429.14
5130 Speaker Fees		2,481.00
5150 Postage		36.00
5155 Dues & Subscriptions		27.50
5175 Merchant Credit Card Fee		32,250.78
5180 ATEGO Resources		12,337.50
5180.1 Travel		891.61
Total 5180 ATEGO Resources	$	13,229.11
5185 New Horizon Enterprise		6,875.00
5190 Bank Charges		17.57
Total 5100 Operations Expense	$	135,798.71
5200 President Expense		
5210 Meeting & Conference/State		0.00
Total 5200 President Expense	$	0.00
5400 Professional Development		
5425 Student Development		100.00
Total 5400 Professional Development	$	100.00
5500 Public Information Expense		
5520 News & Design - Gran Designs		10,693.56
5521 News Production - Proofreader		2,548.00
Total 5500 Public Information Expense	$	13,241.56
5600 Administrative		
5610 Awards		0.00
5620 Bookkeeping/Accounting/Tax Services		6,933.00
Total 5600 Administrative	$	6,933.00
5900 Other Expenses		
5905 Chapter Historian		155.00
5920 Miscellaneous Expense		0.00
5930 Scholarship		2,140.00
Total 5900 Other Expenses	$	2,295.00
6200 Conferences		
6260 Conference Administration		
6261 Committee Meals & Expenses		558.00
Total 6260 Conference Administration	$	558.00
6400 Conference Opening Event		105,457.66
6420 Other Events - Food & Beverage		199,156.67
6420.1 Other Events Food & Beverage		0.00
6450 Conference Facility Expenses		

6451 Meeting Rooms - Exhibitor Services Provider		14,885.82
6453 Meeting Rooms - Audio Visual		95,317.64
6454 Other Conference Facility Expense		12,174.63
Total 6450 Conference Facility Expenses	$	427,550.42
6460 Publicity Material		
6466 Give-Away Design & Purchase		9,097.41
6467 Lanyard Design & Purchase		3,348.00
6468 Printing Cost		6,224.71
Total 6460 Publicity Material	$	18,670.12
6470 Mobile Workshops		756.00
6471 Transportations		6,442.40
6472 Food		1,756.03
6473 Miscellaneous	$	8,954.43
6480 Social Media		
6481 Website		0.00
6481.1 Hosting		6,405.00
6481.2 Support		4,208.33
Total 6481 Website	$	10,613.33
6482 Mobile App		
6482.1 Hosting		5,092.50
6482.2 Support		4,541.70
Total 6482 Mobile App	$	9,634.20
Total 6480 Social Media	$	20,247.53
Total 6200 Conferences	$	475,422.50
6205 VP Conference Expense		1,304.82
6300 Marketing & Membership		
6310 VP Diversity & Equity		0.00
Total 6300 Marketing & Membership	$	0.00
Total Expenditures	$	635,095.59
Net Operating Revenue	$	215,773.45
Net Revenue	$	215,773.45
Additional Items added/subtracted from proceeds		
Credit for extra expense for Deene Alongi's contract	$	13,125.00
Credit back for $3300 website redesign expense incurred this year (412.50 x 8)	$	(412.50)
Revised Net Revenue	$	228,485.95
Seed Money diffence withheld to get to starting bank balance	$	-
Adjust Revenue for Conference distribution	$	228,485.95
Profit Margin		27%

Seed Money Breakdown

Ending bank balance as of 12/31/18	$	31,759.97
Expenses paid out in 2018 for 2019 Conference	$	2,605.05
Seed Money Transfer from Conference #3 (2018) 2/13/19	$	50,000.00
Total Seed Money to Remain in bank account after Proceeds	$	84,365.02
Deene Alongi's Contract payment by the Chapter	$	(13,125.00)
Credit back for Web redesign paid by seed money	$	(2,887.50)
Amount In bank to remain after proceeds paid out	$	68,352.52
Current balance in Conference bank account after proceeds paid out	$	68,352.52
Profits with seed money withheld from profits.	$	-
Deene Alongi's Contract payment by the Chapter	$	26,250.00
Website redesign paid out of conference #1	$	3,300.00

Appendix F-2
American Planning Association, California Chapter
Statement of Activity by Class
January - December 2018

	Total
Revenue	
4300 Miscellaneous Income	20.58
4600 Registration	746,533.00
4700 Sponsorships	
4710 Exhibit Booth & Event Sponsorship Packages	
4711 Opening Reception	24,000.00
4712 Conference Give-Away	8,000.00
4713 Conference Lanyards	8,000.00
4714 Opening Keynote	12,000.00
4716 Awards Events	12,000.00
4717 Mobile App	6,000.00
4718 Student Awards Luncheon	10,000.00
4719 Continental Breakfast	15,000.00
4720 Closing Keynote	7,500.00
4721 CPF Auction	5,000.00
Total 4710 Exhibit Booth & Event Sponsorship Packages	**$ 107,500.00**
4725 Special Events	
4727 $1,500	9,000.00
4728 $1,000	6,000.00
4729 $500	1,000.00
Total 4725 Special Events	**$ 16,000.00**
4730 Event Sponsor	
4736 Diversity Summit	2,250.00
Total 4730 Event Sponsor	**$ 2,250.00**
4737 Public Agency	2,000.00
4738 Non-Profit Organization	2,000.00
4739 Tabletop Sponsor	250.00
Total 4738 Non-Profit Organization	**$ 2,250.00**
4740 Advertising	
4741 Conference Pen	1,000.00
4743 Mobile Application	3,500.00
4744 Program Sponsors	3,325.00
4745 Other (Customizable)	1,000.00
Total 4740 Advertising	**$ 8,825.00**
Total 4700 Sponsorships	**$ 138,825.00**
Total Revenue	**$ 885,378.58**
Gross Profit	**$ 885,378.58**
Expenditures	
5100 Operations Expense	

5106 Conference Management		64,566.54
5107 Conference Registration Mgmt.		750.00
5110 Operations/Miscellaneous		448.00
5120 Insurance Expense		3,414.80
5145 Office Supplies		926.28
5150 Postage		1,061.70
5175 Merchant Credit Card Fee		2,419.47
5180 ATEGO Resources		8,070.42
5185 New Horizon Enterprise		8,125.00
5190 Bank Charges		6.00
Total 5100 Operations Expense	**$**	**89,788.21**
5500 Public Information Expense		
5520 News & Design - Gran Designs		27,867.18
5521 News Production - Proofreader		2,408.00
5525 News Management - NHE		1,770.84
Total 5500 Public Information Expense	**$**	**32,046.02**
5600 Administrative		
5620 Bookkeeping/Accounting/Tax Services		5,610.00
Total 5600 Administrative	**$**	**5,610.00**
5900 Other Expenses		
5930 Scholarship		850.00
Total 5900 Other Expenses	**$**	**850.00**
6200 Conferences		
6260 Conference Administration		
6261 Committee Meals & Expenses		584.61
Total 6260 Conference Administration	**$**	**584.61**
6400 Conference Opening Event		108,420.13
6420 Other Events - Food & Beverage		250,053.98
6450 Conference Facility Expenses		
6451 Meeting Rooms - Exhibitor Services Provider		15,555.10
6453 Meeting Rooms - Audio Visual		76,832.06
Total 6450 Conference Facility Expenses	**$**	**92,387.16**
6460 Publicity Material		
6466 Give-Away Design & Purchase		3,291.00
6467 Lanyard Design & Purchase		2,243.00
6468 Printing Cost		305.00
Total 6460 Publicity Material	**$**	**5,839.00**
6470 Mobile Workshops		805.00
6471 Transportations		285.00
6472 Food		2,619.43
6473 Miscellaneous		215.89
Total 6470 Mobile Workshops	**$**	**3,925.32**
6480 Social Media		
6481 Website		4,995.67
6482 Mobile App		9,770.83
Total 6480 Social Media	**$**	**14,766.50**
Total 6200 Conferences	**$**	**475,976.70**

6205 VP Conference Expense		805.77
Total Expenditures	$	605,076.70
Net Operating Revenue	$	280,301.88
Net Revenue	$	280,301.88
Additional Items added/subtracted from proceeds		
Credit for extra expense for Deene Alongi's contract	$	13,125.00
Revised Net Revenue	$	293,426.88
Seed Money	$	(21,317.47)
Adjust Revenue for Conference distribution	$	272,109.41
Profit Margin		31%

Seed Money Breakdown

Ending bank balance as of 12/31/17	$	2,943.12
Deposit to Conference Account on 6/28/17 to cover 2018 Venue deposit of $10,000	$	15,000.00
Depsit to Conference Account on 1/18/18 to cover venue Deposit of $40,000.00	$	12,434.93
Deposit to Conference Account on 1/18/18 to cover 2018 Venue deposit of $40000.00	$	36,550.00
Deposit to Conference Account on 1/18/18 to cover 1st Pmnt to Deene of $18333.33	$	9,839.60
Total Seed Money paid to Conference #3 (2018) for up front expenses	$	76,767.65
Current balance in Conference bank account after proceeds paid out	$	55,450.18
Profits with seed money withheld from profits.	$	21,317.47
	$	76,767.65

APA
CA

American Planning Association
California Chapter

Making Great Communities Happen

APA California 2020 Conference

EXHIBITOR AND SPONSORSHIP OPPORTUNITIES

CULTIVATING OUR FUTURE

2020 APA CALIFORNIA CONFERENCE
RIVERSIDE, CA | SEPTEMBER 12-15

RIVERSIDE CONVENTION CENTER
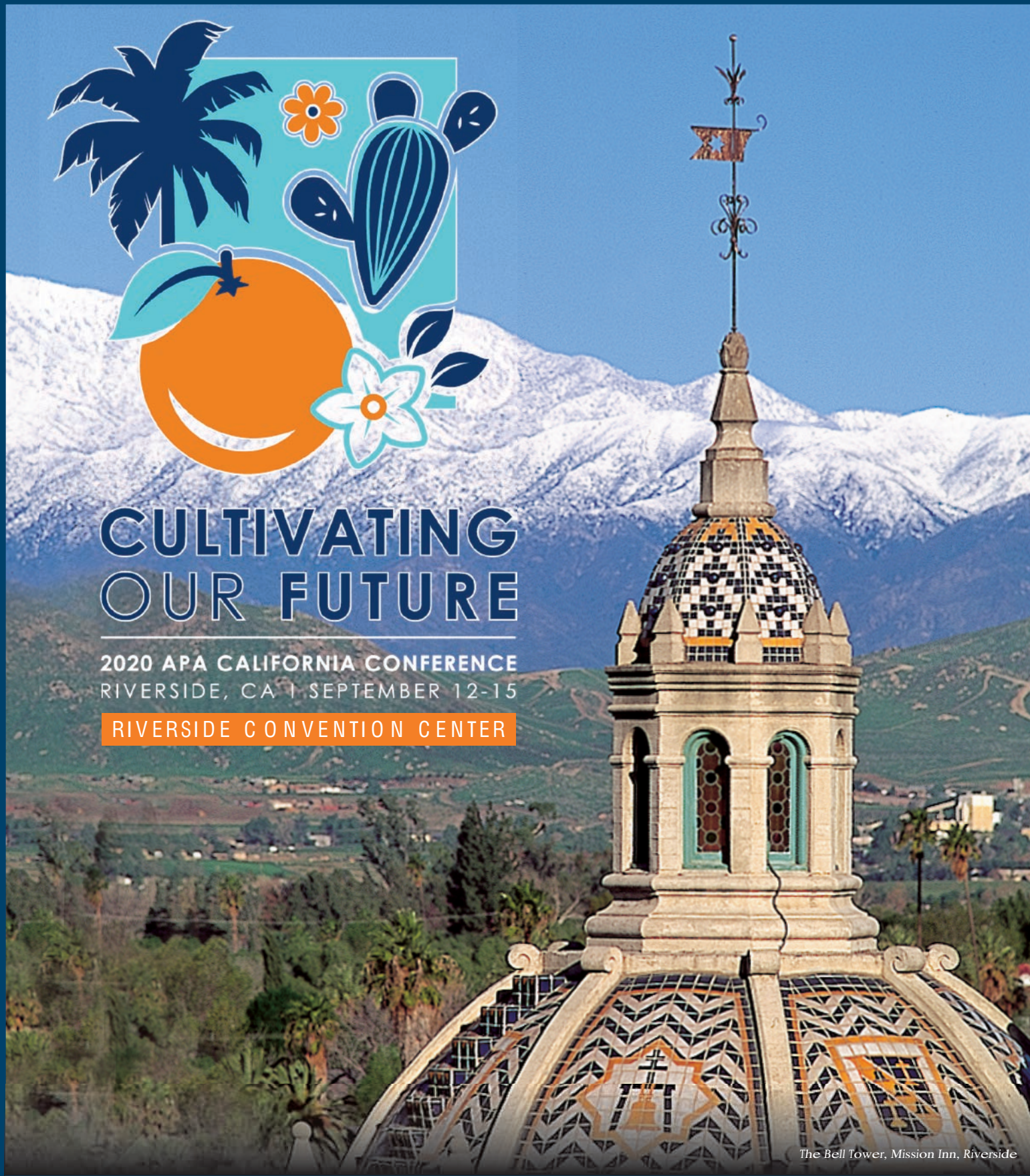
The Bell Tower, Mission Inn, Riverside

Who We Are

Over 5,000 members strong, APA California is a network of practicing planners, citizens and elected officials committed to urban, suburban, regional and rural planning in the State of California. APA California offers a wide spectrum of member benefits including information, services and support to advance planning in California.

MISSION STATEMENT

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

Towards that end APA California will:

- Provide vision and leadership that fosters better planning for California.

- Build public and political support for sound planning.

- Provide its members with the tools, services and support that advance the art and science of planning.

This mission statement has no horizon year; rather, it is to be used as a broad guideline for decisions concerning the more specific strategic objectives, master strategies and action programs.

PAST APA CALIFORNIA CONFERENCE REGISTERED ATTENDEES

Year	Location	Attendees
2019	Santa Barbara	1,519
2018	San Diego	1,665
2017	Sacramento	1,462
2016	Pasadena	1,759
2015	Oakland	1,553
2014	Anaheim	1,236
2013	Visalia	700
2012	Rancho Mirage	716
2011	Santa Barbara	901
2010	Carlsbad	840
2009	Tahoe	490
2008	Los Angeles	1,353
2007	San Jose	1,609
2006	Garden Grove	1,226

OUR FUNDAMENTAL VALUES

The mission statement reflects the underlying, fundamental beliefs of APA California's board members who represent the breadth and geographic diversity of planning in California. These values include:

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

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

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

- SUPPORT: The development, nurturing and preservation of a grass-roots constituency, both in the profession and in the larger community, that recognizes, accepts and advocates the values of good community, regional and other planning programs. The Chapter's commitment to a broad public relations strategy is an example of this support strategy in development.

- TOOLS, SERVICES AND SUPPORT: A commitment at every level of the organization to offer our members the tools, services and support to achieve their goals. These include regular membership services such as: a) the newsletter; b) legislative initiatives; c) participation on task forces and local review committees; d) recognition and advancement of our professional goals through comprehensive awards programs; e) a variety of continuing education programs to foster professional growth; f) annual conferences for education and networking; and g) a variety of locally sponsored and produced programs in each of California's eight sections that respond quickly and effectively to member needs at the local level.

Application Deadline:
July 15, 2020

CULTIVATING OUR FUTURE
2020 APA CALIFORNIA CONFERENCE
RIVERSIDE, CA | SEPTEMBER 12-15

Riverside Convention Center
Exhibitor and Sponsorship Registration

Submit completed application to: Jennifer Lynch at *JLynch@manatt.com*

Questions about sponsoring, contact:
Jennifer Lynch at *JLynch@manatt.com*, 714-371-2516

Name _____   Company Name _____

Address _____   City _____ State _____ Zip _____

Phone _____ Fax _____ Email _____

Company Website Address: _____

Company name exactly as you would like written when logo is not used/provided:

_____

EXHIBIT BOOTH AND EVENT SPONSORSHIP PACKAGES

- [ ] Conference Lanyards (1 available) $12,000
- [ ] Conference Hotel Key Card (1 available) $8,000
- [ ] Optional Item (Water Bottle, etc., call/email for details) $8,000
- [ ] Opening Reception (7 available) $7,000
- [ ] Opening Keynote (6 available) $4,000
- [ ] Award Ceremony (4 available) $3,000
- [ ] CPF Reception (4 available) $3,000
- [ ] Mobile Application (2 available) $3,000
- [ ] Closing Keynote (3 available) $2,500
- [ ] Continental Breakfast (3 available) $2,500
- [ ] Diversity Summit (2 available) $2,500
- [ ] Student Awards (2 available) $2,500

EXHIBIT TABLE ONLY

- [ ] Public Agenices & Educational Institutions (4 available) . . .$1,000
  Includes city, county, regional, state and federal government agencies, universities and colleges.
- [ ] Non-Profit Organization (2 available) $500

ADVERTISING

- [ ] Mobile Application (5 available) $1,000
- [ ] Minor Collateral (conference pen, etc.), call/email for details
- [ ] Other - Customizable . . . . .Please call/email

EVENT ONLY SPONSORSHIPS

Special Event (no limit, check one): $2,000
- [ ] Opening Reception
- [ ] Opening Keynote

Mobile Workshop (TBD available) $500
(specify which mobile workshop):
_____

Special Event (no limit, check one): $1,500
- [ ] Award Ceremony
- [ ] CPF Reception
- [ ] Closing Keynote
- [ ] Diversity Summit

Special Event (no limit, check one): $500
- [ ] Student Awards
- [ ] Diversity Mixer
- [ ] Student/Emerging Planners Mixer
- [ ] Afternoon Break (4 available) $500
- [ ] Student Orientation/Tour (4 available) $300

EXHIBITOR REGISTRATION

Exhibits are for the support of the conference and promotion of your product, service, or program and have been created for flexibility in price and level of exposure. *Exhibit locations are on a first-come, first-pay basis.* A specified number of complimentary booth passes (complimentary for booth staff use only and does NOT permit attendance at sessions, meals, or events) are included in the booth costs.

Booth 1st Choice _____   Booth 2nd Choice _____   Booth 3rd Choice _____

PLEASE TOTAL THE ITEMS SELECTED ABOVE HERE: $ _____

Check Payments: Make check payable to APA California and mail to: APA California Conference, PO Box 171171, Boise, ID 83717
Credit Card Payment: Contact Laura Dee at • simplybookkeepingpro@outlook.com

www.APACalifornia-Conference.org

Application Deadline: July 15, 2020

Riverside Convention Center
Exhibitor and Sponsorship Opportunities

Submit completed applications and questions to: Jennifer Lynch at *JLynch@manatt.com*, 714-371-2516

EXHIBIT BOOTH AND EVENT SPONSORSHIP PACKAGES	QUANTITY AVAILABLE	COST	FULL CONFERENCE REGISTRATIONS	BOOTH SPACE	TICKETS TO EVENT	RECOGNITION	OTHER
Conference Lanyards	1	$12,000	2	Premium	-	✔✔	Logo on Lanyard
Conference Hotel Key Card	1	$8,000	2	Premium	-	✔✔	Logo on Hotel Key Card
Optional Item (water bottle, etc.)	1	$8,000	2	Premium	-	✔✔	call/email for details
Opening Reception	7	$7,000	2	Premium	2	✔✔	-
Opening Keynote	6	$4,000	2	Regular	2	✔✔	-
Award Ceremony	4	$3,000	1	Regular	-	✔✔	-
CPF Reception	4	$3,000	1	Regular	1	✔✔	-
Mobile Application	2	$3,000	1	Regular	-	✔	-
Closing Keynote	3	$2,500	1	Regular	-	✔✔	-
Continental Breakfast	3	$2,500	1	Regular	-	✔	-
Diversity Summit	2	$2,500	1	Regular	-	✔✔	-
Student Awards	2	$2,500	1	Regular	2	✔	-
EVENT ONLY SPONSORSHIPS							
Special Event (select one) Opening Reception, Opening Keynote	No Limit	$2,000	-	-	-	✔	-
Mobile Workshop (select one) Mobile Workshops will be listed when confirmed.	TBD	$500	-	-	1 MW	✔	-
Special Event (select one) Diversity Summit, Award Ceremony, CPF Reception, Closing Keynote	No Limit	$1,500	-	-	-	✔	-
Special Event (select one) Diversity Mixer, Student Awards, Student/Emerging Planners Mixer	No Limit	$500	-	-	-	✔	-
Afternoon Break	4	$500	-	-	-	✔	-
Student Orientation/Tour	4	$300	-	-	2	✔	-
EXHIBIT TABLE ONLY							
Public Agencies & Educational Institutions Includes city, county, regional, state and federal government agencies, universities and colleges	4	$1,000	-	-	-	✔	-
Non-Profit Organization	2	$500	-	-	-	✔	-
ADVERTISING							
Mobile Application	5	$1,000	-	-	-	✔	-
Minor Collateral (conference pen, etc.)						✔	call/email for details
Other - Customizable						✔	call/email for details

All premium booth exhibitors have priority selection. All regular and premium booths include drapery. All booths with event sponsorships and non-profit sponsors receive the attendee list prior to the conference (available 2 weeks prior and includes name, company, address, and email address of attendees).
Recognition includes: ✔ - Logo posted on website and mobile app. ✔✔ - Additional podium acknowledgement at event.
Logos and ads are posted after payment has been received.

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RIVERSIDE, CA | SEPTEMBER 12-15

Logo and Business Card Ad Specifications
Exhibitor Service Information
Quick Facts

Logo Specifications

Depending on your sponsorship level, your logo may be used for the Conference Mobile App, APA website and signage. Please send the best quality logo possible. If a logo has been previously submitted and has since changed, please send an updated logo that meet the specifications to the right.

• Send black & white AND color if both are available.

The following formats are accepted, in order of preference

• EPS (fonts converted to curves or vector)*

• PDF - high resolution, 300 dpi, 3"x4" min. at 100% size

• JPEG - high resolution, 300 dpi, 3"x4" min. at 100% size

*We can only guarantee best quality with EPS files that are submitted to specifications.
Note: Do not send files that were used in/as part of a website. They are not high enough resolution for use in print.

Business Card Ad Specifications

As part of many sponsorships, your company may receive a business card size ad that will be posted on the conference website. Please refer to Sponsor and Exhibitor Opportunities page of this brochure.

Ad Size: 3.5" wide x 2" tall (add border around your ad)
Ad Color: Full color or greyscale
Ad Formats: PDF, JPEG, TIF, EPS (all fonts converted to curves)
Ad Resolution: 300 at original size

Submit logo and ad; or for information regarding logo and ad specifications, please contact:
Dorina Blythe • dorina@GranDesigns.us

Logo and Ad Submission Deadline: Upon contract submittal.

Logos and ads are posted after payment has been received according to the Sponsor/Exhibitor Opportunities benefit detail for your sponsorship, located on page 3 of the sponsor brochure.

Exhibitor Service Information Quick Facts

8' X 10' Standard Booth Package includes:

• 8' high draped back wall
• 3' high draped side rail
• One 6' skirted table
• Two padded side chairs
• One wastebasket
• One 44" x 7" ID sign with your company name and booth number

Tabletop Package includes:

• One 6' skirted table
• One padded side chair
• One wastebasket
• One 44" x 7" ID sign with your company name and booth number

Note: The entire exhibit hall is fully carpeted.

Complete information including Exhibitor move in/out dates/times, discount rates/deadlines for additional services required and shipping information will be sent to all Exhibitors *four months* prior to the conference by the vendor and posted on the conference website.

Submit completed application to: Jennifer Lynch at *JLynch@manatt.com*

Questions about sponsoring, contact: Jennifer Lynch at *JLynch@manatt.com*, 714-371-2516

For questions about sponsor payments, please contact:
Laura Dee • *simplybookkeepingpro@outlook.com* • 925-550-4450

Sponsor and Exhibitor Cancellation Policy

If written cancellation of a sponsor/exhibitor contract is received by 6/15/20, a full refund will be made.
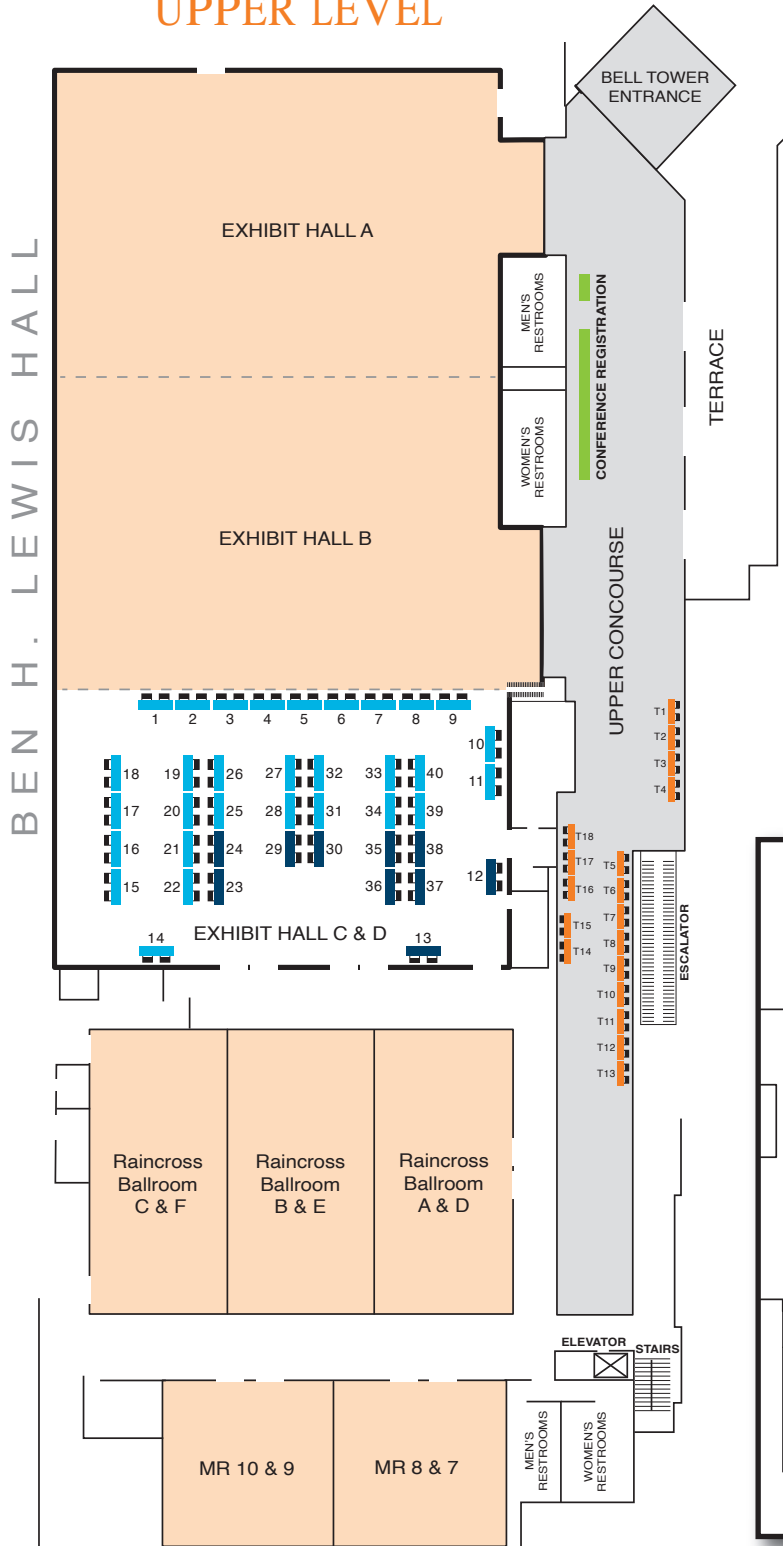If written cancellation of a sponsor/exhibitor contract is received by 7/15/20, an 80% refund will be made.
No refunds or cancellations accepted after 7/15/20.

www.APACalifornia-Conference.org

Riverside
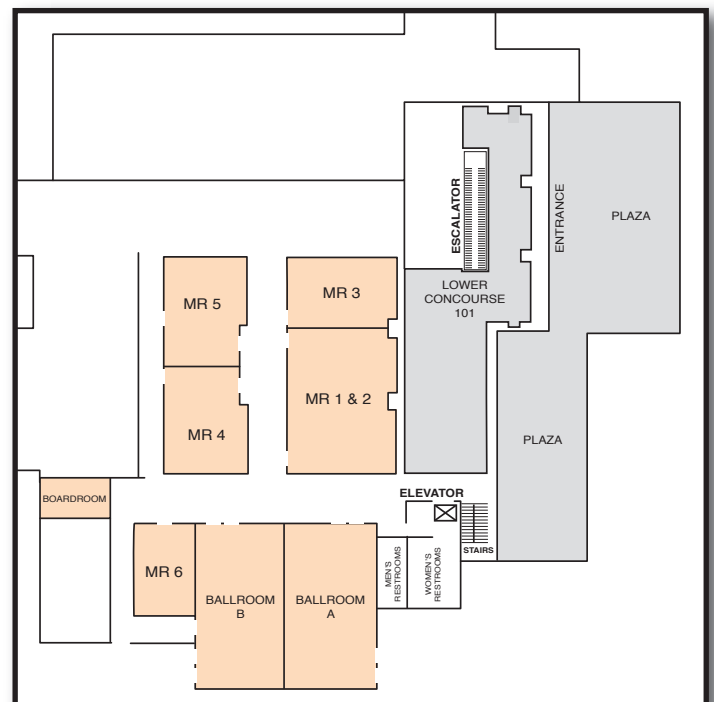# Convention Center

UPPER LEVEL

BEN H. LEWIS HALL

BELL TOWER ENTRANCE

EXHIBIT HALL A

EXHIBIT HALL B

MEN'S RESTROOMS

WOMEN'S RESTROOMS

CONFERENCE REGISTRATION

TERRACE

UPPER CONCOURSE

1 2 3 4 5 6 7 8 9

10

11

18 19 26 27 32 33 40

17 20 25 28 31 34 39

16 21 24 29 30 35 38

15 22 23 36 37

12

14

EXHIBIT HALL C & D

13

T1
T2
T3
T4

T18
T17
T16
T15
T14

T5
T6
T7
T8
T9
T10
T11
T12
T13

ESCALATOR

Raincross Ballroom C & F

Raincross Ballroom B & E

Raincross Ballroom A & D

MR 10 & 9

MR 8 & 7

MEN'S RESTROOMS

WOMEN'S RESTROOMS

ELEVATOR

STAIRS

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RIVERSIDE, CA | SEPTEMBER 12-15

- ■ Premium Booth
- ■ Booth
- ■ Table
- ■ Registration
- ■ Session/Event Locations

LOWER LEVEL

MR 5

MR 3

MR 4

MR 1 & 2

ESCALATOR

LOWER CONCOURSE 101

ENTRANCE

PLAZA

PLAZA

BOARDROOM

MR 6

BALLROOM B

BALLROOM A

MEN'S RESTROOMS

WOMEN'S RESTROOMS

ELEVATOR

STAIRS

www.APACalifornia-Conference.org

CULTIVATING OUR FUTURE
2020 APA CALIFORNIA CONFERENCE
RIVERSIDE, CA | SEPTEMBER 12-15

Riverside
Convention Center
UPPER LEVEL EXHIBITS

Questions about sponsoring, contact:
Jennifer Lynch at JLynch@manatt.com, 714-371-2516
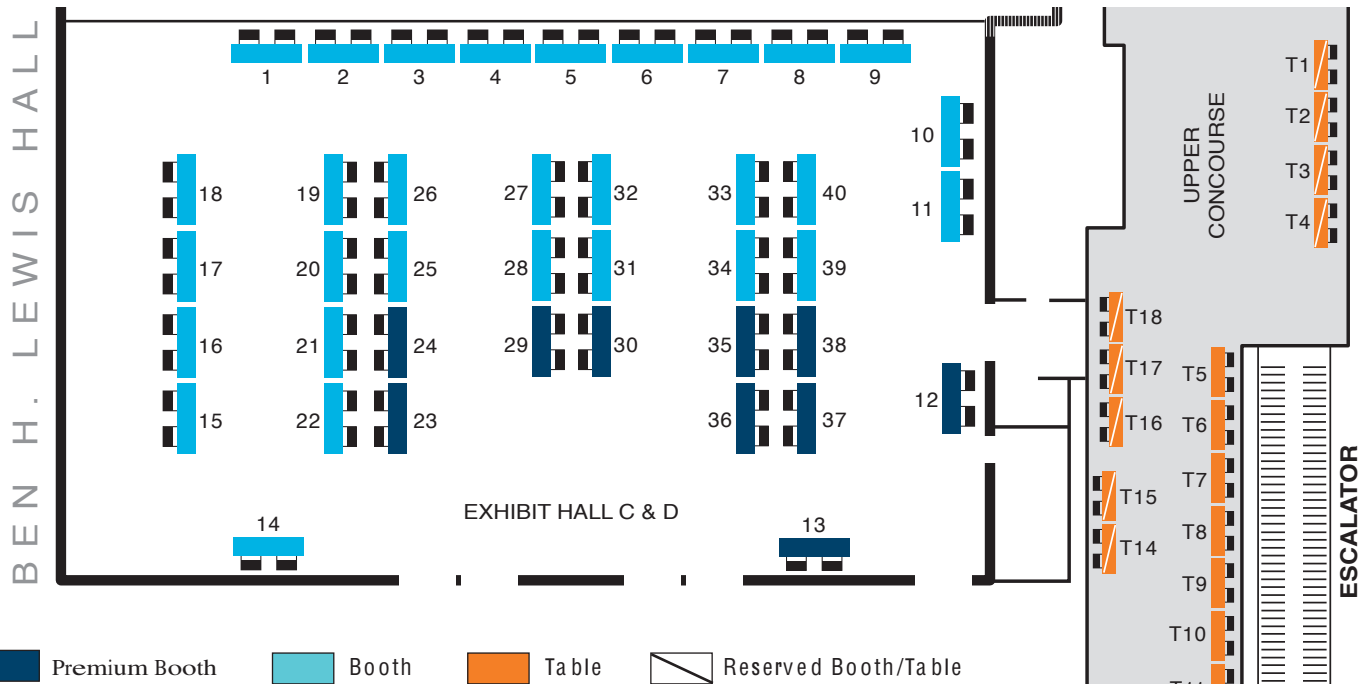
BEN H. LEWIS HALL

EXHIBIT HALL C & D

UPPER CONCOURSE

ESCALATOR

Legend:
- Premium Booth
- Booth
- Table
- Reserved Booth/Table

Booth..1	Premium Booth 24	
Booth..2	Booth...25	
Booth..3	Booth...26	
Booth..4	Booth...27	
Booth..5	Booth...28	
Booth..6	Premium Booth 29	
Booth..7	Premium Booth 30	
Booth..8	Booth...31	
Booth..9	Booth...32	
Booth..10	Booth...33	
Booth..11	Booth...34	Table T7
Premium Booth 12	Premium Booth 35	Table T8
Premium Booth 13	Premium Booth 36	Table T9
Booth..14	Premium Booth 37	Table T10
Booth..15	Premium Booth 38	Table T11
Booth..16	Booth...39	Table T12
Booth..17	Booth...40	Table T13
Booth..18	Table - Reserved T1	Table - Reserved T14
Booth..19	Table - Reserved T2	Table - Reserved T15
Booth..20	Table - Reserved T3	Table - Reserved T16
Booth..21	Table - Reserved T4	Table - Reserved T17
Booth..22	Table T5	Table - Reserved T18
Premium Booth 23	Table T6	

5+ YEAR SPONSOR · APA CALIFORNIA CONFERENCE

Exhibit map subject to change. Rev. 3 11/13/19

CONFERENCE SIGNATURE & OTHER ARTWORK SPECIFICATIONS:
The Chapter's Design and Publications Management Consultant (DPMC) works at the direction of the CHC to design the Conference Signature. Once the Conference Signature is approved by the CHC, the DPMC and Chapter's Website Manager will create files mentioned below and others as needed. Ultimately, the CHC will be responsible for using a signature and other artwork (*including local photographic images*) to promote the Conference. This Specification Sheet is designed to help you better understand the process and guide you as such artwork in being developed.

I. CONFERENCE SIGNATURE
The Conference Signature (*as outlined in the Conference Manual*) which falls under the work scope of the DPMC shall be developed as a vector file and not a raster (or bitmap) file. This will allow for further modification and print preparation of the file as deemed necessary. See the example below to better understand the difference.

VECTOR	RASTER

(or not quality

Vector art is made of paths lines) and is dependent on resolution for

Raster images are made of a series of pixels and is dependent on resolution for quality

Examples include:

photos or images

Examples include: *line work or drawings*

Formats include: *.ai, .cdr, .eps, .svg*

Formats include: *.jpg, .tif, .png, .bmp*

Once the Conference Signature is finalized, it will be converted to other formats (*both vector and raster*) according to the specifications needed for reproduction or use for the various Conference materials.

II. CONFERENCE ARTWORK

In certain circumstances, the signature will need to be applied to an iconic image (representing the host city or area) as a background. The CHC shall be responsible for determining such representation and procuring/ obtaining the necessary high-quality (min 3"X 5" at 150 dpi) images. The final quality or resolution of the image should be commensurate to its physical size with larger images requiring a higher resolution.

Image size vs. File size: Image size refers to the dimensions of the image while file size is how much space the image requires for file storage (KB or MB).

DPI (*dots per inch*) vs. PPI (*pixels per inch*): DPI is a resolution measure for printed material whereas PPI is a digital measurement used for websites.

Example of Photo Usage Across Different Platforms:

	WEBSITE	CALPLANNER	PRINTED MATERIALS
Dimensions	8.33" X 5"	1.5" X 2.5"	3" X 5"
DPI	72 dpi	150 dpi	300 dpi
PPI	600 X 360	N/A	N/A
File Size	~650 KB	~250 KB	~ 4MB

Selecting Colors/Inks: Colors should initially be based on PMS (Pantone Matching System) Spot Colors as a reference point for all Conference materials. Colors will then be translated depending on the platform in either a CMYK (print process) or RGB (digital) format.

Chapter Branding: Where applicable, APA California branding shall be incorporated on Conference materials and implemented according to the Chapter's Branding Guidelines. The DPMC and Website Manager will be responsible for applying the appropriate branding for both APA California and the Conference.

III. IMAGE SPECIFICATIONS

Following is a list of some of the requirements for the regularly used platforms in which Conference related material and artwork are utilized. For others not listed here, please consult with the Chapter's Design and Publications Management Consultant.

1. APA California Website

Front Page: 600 (pixels) X 325 (pixels) at 300 dpi

Conference (*or Interior*) Page: 540 (pixels) X 300 (pixels) at 300 dpi

2. CalPlanner

Masthead Image: Subject matter or content should be of a horizontal orientation and ultimately fit a 6" X 3.25" at 300 dpi

Other Pages: varies depending on editorial (*check with Chapter's Design and Publications Management Consultant*), but an individual image's file size should be less than 1 MB

3. Email Alerts

E-Blasts & Other Digital Announcements: Call for specifications

4. LinkedIn and Other Social Media

LinkedIn Discussion Board Banner: 646 (pixels) X 200 (pixels) at 150 dpi

Other Social Media: Call for specifications

APPENDIX H
HISTORIC NET PROFIT, SPONSORSHIP INCOME & ATTENDANCE

YEAR	LOCATION/SECTION	NET PROFIT	SPONSORSHIPS	ATTENDANCE
2019	Santa Barbara/Central Coast	$ 228,486	$ 148,250	1,519
2018	San Diego/San Diego	$ 272,109	$ 138,825	1,665
2017	Sacramento/Sacramento Valley	$ 205,425	$ 127,137	1,462
2016	Pasadena/Los Angeles	$ 343,488	$ 144,675	1,758
2015	Oakland/Northern	$ 135,931	$ 147,645	1,590
2014	Disneyland/Orange	$ 38,763	$ 114,100	1,257
2013	Visalia/Central	$ 136,737	$ 76,001	717
2012	Rancho Mirage/Inland Empire	$ 140,000	$ 120,650	708
2011	Santa Barbara/Central Coast	$ 131,000	$ 81,900	879
2010	La Costa/San Diego	$ 78,782	$ 56,390	838
2009	Squaw Creek/Sacramento Valley	$ 52,690	$ 82,750	N/A
2008	Hollywood/Los Angeles	$ 143,036	$ 173,300	N/A
2007	San Jose/Northern	$ 216,216	$ 158,450	N/A
2006	Garden Grove/Orange	$ 142,258	N/A	N/A
TOTAL	*(for 2010 to 2019 only)*	$ 1,710,721	$ 1,155,573	12,393
AVER.		$ 171,072	$ 115,557	1,239
P/P		$ 138	$ 93	

APPENDIX i

APA California and Section Legal and Insurance Activity Guidelines

Because of the need to protect ourselves against the threat of preventable lawsuits and because of regulations from our insurance carrier, we are to follow these guidelines in the planning and conduct of Association and Section activities:

1.   Activities other than normal meetings of members are to receive prior approval from the Board, or the Board's designee. This is to include Association and Section sponsorship or endorsement of activities which present excessive risk of harm for members and guests. A white water rafting excursion is an example.

2.   Endorsement or distribution of products and services are also to receive prior approval. This includes acceptance of products and services as donations for use in fund raising.

3.   The Association and Sections are not to sell or distribute alcoholic beverages. If alcohol is to be part of a meeting or other activity it should be served by a caterer providing evidence of adequate insurance, or by the service staff of the facility in which the meeting/activity is to be held.

4.   Any transportation arranged in conjunction with an activity is to be provided only by a transportation company holding a valid PUC certificate of operation and in force vehicle liability insurance, both of which are to be evidenced by a current Certificate of Insurance.

Conduct of regular activities which fall within these guidelines do not require prior approval. If there is any question as to the acceptability of an activity, contact the Association office. A minimum of three (3) weeks advanced notice is to be given to allow the APA California Director of Administration to contact our insurance carrier to determine the acceptability of any activity and/or whether any additional premium will be charged.

Certificate of Insurance Request Form

Date of Request: _____

Person Completing this Form: _____

Email Address: _____

INSURED: _____

Address: _____

Fax #: _____ Phone #: _____

Describe Event: _____

Event Questionnaire may be required

Date/s: _____

Location/Address: _____

Party (Certificate Holder) Requesting the Certificate (Not you, you are the Insured):

Attn: _____

Address: _____

Fax #: _____ Phone #: _____

Email Address: _____

Have you entered into any signed agreement or contract with the Certificate Holder? ☐ Yes* ☐ No

Additional Insured Requested: ☐ Yes* ☐ No

* If yes, please provide us with the insurance portion of the contract so that we may review it.
   Without a contract, we cannot add the Additional Insured or any other special wording.

Certificate Distribution

Brokered Accounts
☐ Mail original to Certificate Holder
☐ Email copy to broker for further distribution
Please provide email address:

PLEASE RETURN COMPLETED QUESTIONNAIRE TO:

diane@mcclatchyins.com
• Fax: 916-488-2336
• Or mail to McClatchy Insurance

M℃LATHCY INSURANCE AGENCY

2410 FAIR OAKS BLVD., SUITE 140
SACRAMENTO, CALIFORNIA 95825

ASAE Endorsed Association Office Package
Certificate of Insurance Request Form

Date of Request: _____

Person Completing this Form: _____

Email Address: _____

Phone #: _____

Named Insured: _____

Chapter Name
    If Applicable _____

Address: _____

Describe Event: _____
        Event Questionnaire may be required

Date(s): _____

Location/Address: _____

Certificate Holder _____

Attn: _____

Address: _____

Email Address: _____ Phone: _____

Have you entered into any signed agreement or contract with the Certificate Holder? ☒ Yes* ☐ No

Additional Insured Requested: ☒ Yes* ☐ No **(ADDITIONAL CHARGES MAY APPLY)**

* Without a contract, we cannot add the Additional Insured or any other special wording.

Certificate Distribution

Email copy to:	Another method of delivery:
☒ Certificate Holder ☒ Person completing this form	☐

PLEASE ALLOW <u>AT LEAST 48 HOURS</u> TO PROCESS THIS REQUEST.

PLEASE COMPLETE AND RETURN TO:

Wendyann Henry
Wendyann.Henry@aon.com

Aon Association Services
A Division of Affinity Insurance Services, Inc.
1120 20th Street, N.W., 6th Floor
Washington, D.C. 20036-3406

Direct: 202-862-5349 • Fax: 847-953-2672

APPENDIX J
CONFERENCE THEMES SINCE 1988

Year		Location	Section
2020	Cultivating Our Future	Riverside	IE
2019	A Resilient Future	Santa Barbara	CC
2018	Shaping Our Future	San Diego	SD
2017	Capitalizing on Our Diversity	Sacramento	SV
2016	Crafting Our Future: The Art of Planning	Pasadena	LA
2015	Rooted in AuthentiCITY	Oakland	N
2014	California's Adventures in Planning	Anaheim	O
2013	Planning Under the Sun	Visalia	C
2012	Prepare, Plan, Preserve	Rancho Mirage	IE
2011	Mission Possible: Get Smart	Santa Barbara	CC
2010	Coast, Crest, Cactus: Elevating Sustainability	Carlsbad	SD
2009	Long Views Greater Vision	Lake Tahoe	SV
2008	Lights...Planning...Action	Los Angeles	LA
2007	Transforming the Urban Fabric	San Jose	N
2006	Reinventing Suburbia	Garden Grove	O
2005	No Theme	Yosemite	C
2004	Planning for Tomorrow's Bright Future	Palm Springs	IE
2003	A Link to the Past, A Bridge to the Future	Santa Barbara	CC
2002	PlanDiego	San Diego	SD
2001	APA at the Confluence	Sacramento	SV
2000	Reaching Out, Building Bridges	Long Beach	LA
1999	Celebrating Diversity	Bakersfield	C
1998	Mirrors and Reflections	Costa Mesa	O
1997	Choices, Challenges and Change	Monterey	N
1996	The Heat is On	Palm Springs	IE

1995	Redefining Paradise, California's Challenge	Santa Barbara	CC
1994	Edges, Borders, New Frontiers	San Diego	SD
1993	Maintaining California's Competitive Edge	Modesto	C
1992	Celebrate the Spirit of Planning	Pasadena	LA
1991	On the Edge	Sacramento	SV
1990	Glitz versus Glitches	Newport Beach	O
1989	Pacific Rim	San Jose	N
1988	Hard Choices	Palm Springs	IE

A RESILIENT FUTURE 2019
CALIFORNIA APA CONFERENCE
SANTA BARBARA
SEPTEMBER 15-18

Call for Proposals

Submissions Open: December 1, 2018
Submissions Close: January 31, 2019, 5:00 pm

Late submissions will not be accepted

Sea level rise, extreme climate events, energy uncertainty, drought, fire, economic fluctuations, seismic activity – you name it, California sees it all. Even communities that are not yet dealing with these issues should be aware of potential impacts from these challenges and be ready to address them. As such, we invite you to submit a proposal that highlights case studies, innovative tools, and strategies that help guide your community towards **A Resilient Future**. Additional planning topics of state-wide interest, such as housing, law and policy, transportation, and professional development will also contribute towards California's resilient future. Please consider how your session will fit in to one of the following tracks:

Conference Tracks

Track 1: The Future is Now – Innovation and Emerging Issues
How can various emerging trends help our communities succeed in this changing world? This track examines emerging technologies and other innovations that are impacting our lives, our communities, and influencing how we prepare and plan for the future.

Track 2: Come Together – Encouraging Cooperation and Partnerships
Recent disasters in the state have illustrated how resilience requires working cooperatively. Volunteers, NGOs, design professionals, emergency responders, researchers, and government agencies provide the fabric that helps our communities prepare, respond, recover, and thrive. This track explores how various stakeholders can work towards successful outcomes and the benefits of community partnerships.

Track 3: Nuts and Bolts – Preparing the Planning Office of the Future
Core skills such as project management, development review, land use law, CEQA application, or planning ethics represent the brain-fuel that keeps the planning office moving forward. Resiliency-related skills, such as grant writing and working through state and federal agencies must also be developed. This track identifies areas for further learning and exploration.

Track 4: Riding the Wave – Adapting to New Realities
Our communities are changing daily and contributing to a new reality that requires creative and collaborative responses to prepare, respond, and adapt. Planners should be at the forefront of where social, political, economic, and environmental issues intersect. This track highlights lessons learned regarding adaptation to natural and manmade challenges.

Proposal Contents

All submittals must be made using the online form, which can be found at: *https://www.memberleap.com/members/proposals*

Emailed, faxed, or mailed submittals will not be accepted. Late or incomplete submittals will not be accepted. When submitting online, proposers must provide the following information:

Session Title: A brief title that reflects the content of the session.

Summary: A short description of the session to be used in the conference program (50 words or less).

Abstract: A description of the session and its relevance to the conference theme and track title (200 words or less). Proposals should demonstrate learning objectives to qualify for AICP CM credit.

Track and Planning Topic: Identification of the primary planning related topic(s) that will be addressed in the presentation and an explanation of why it fits into one of the conference tracks or core areas (Law or Ethics).

Session Types: Session (90 minutes – multiple panelists/presentations); Workshop (90 minutes or 3 hours divided into two 90 minute sections – includes tabletop dialogue or participant activities).

Panelist Bios and Contact Information: A short biography (50 words or less) and contact information for each presenter (job title, employer, email).

Additional Information

Successful proposals will demonstrate a broad discussion of the proposed topic through panelists with varying expertise and perspectives. Proposals with a diversity of speakers from both the public and private sector are encouraged, as are proposals that include speakers from multiple firms and/or jurisdictions.

While considering how to shape your proposal, also consider using a unique session style. How could you better engage your audience in the topic? This conference is open to and encourages presentations that are out of the ordinary. Would attendees benefit if your session could be presented over two session blocks for a total of 3 hours - what unique format or type of engagement would the longer session allow attendees to participate in? All panelists that are selected to present at the 2019 conference will receive a reduced speaker rate for the 2019 conference.

If you have questions about submitting a proposal, contact the Programs Subcommittee Co-Chairs at *Calapa2019programs@gmail.com*.

Please note that this is not the pathway for Student Program or Mobile Workshop proposals. Those subcommittees are working separately to develop their programs. If you have a Student Program idea, please email Rachel Raynor at *rcraynor@rrmdesign.com*, or a Mobile Workshop idea can be sent to Lily Rudolph at *lrudolph@rinconconsultants.com*.

Santa Barbara Pier Aerial View
Photo by David Collier, Courtesy of Visit California
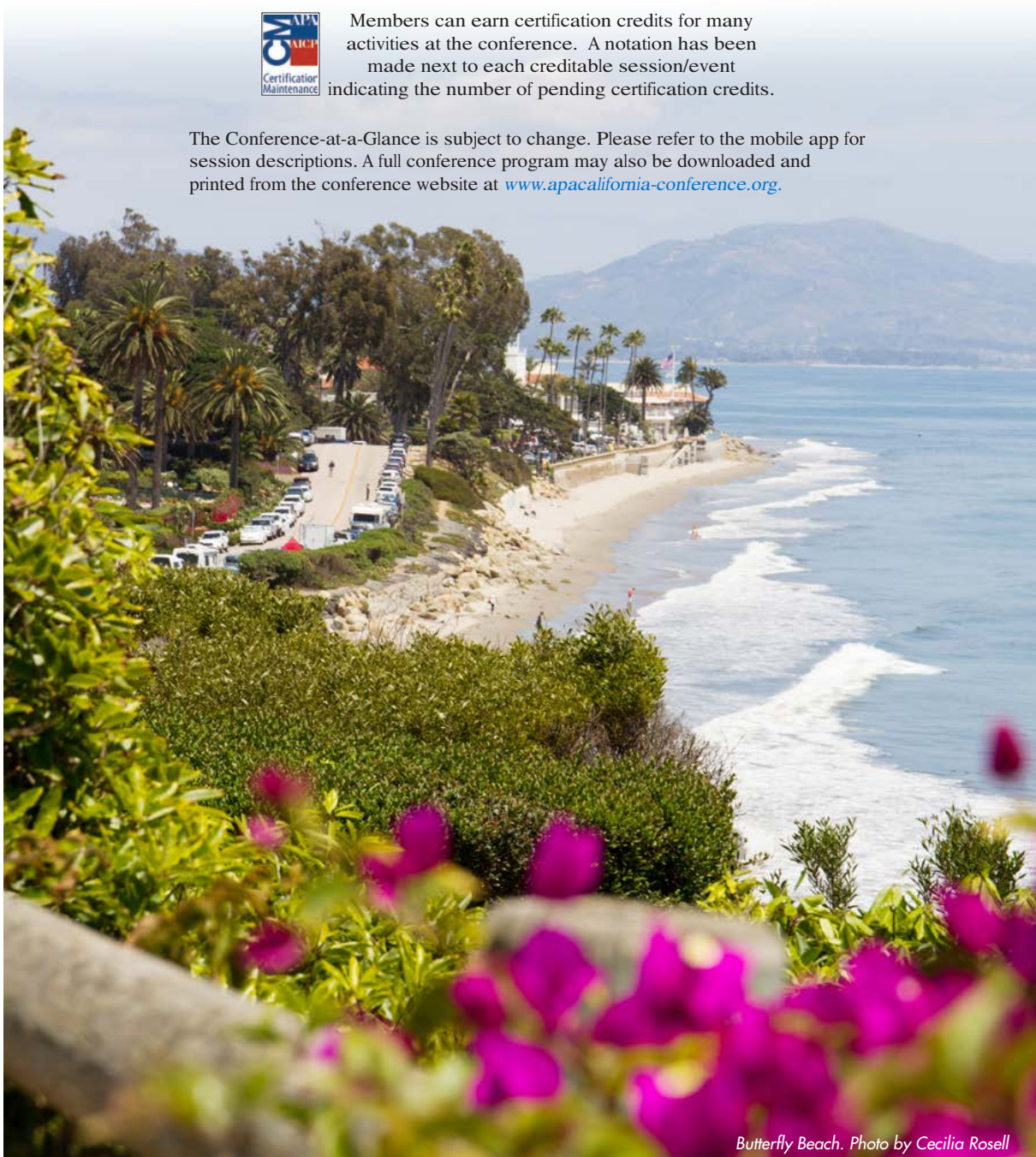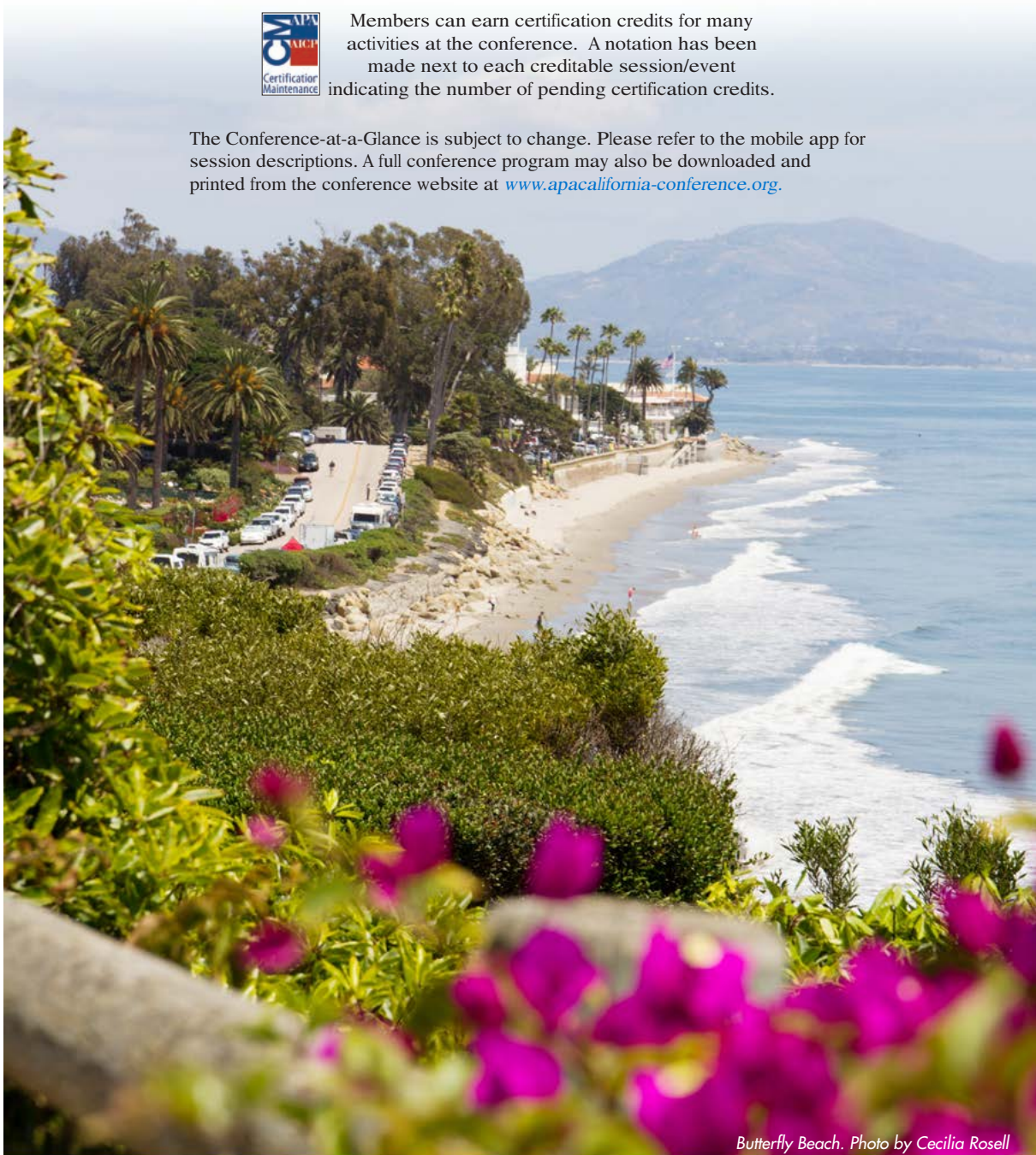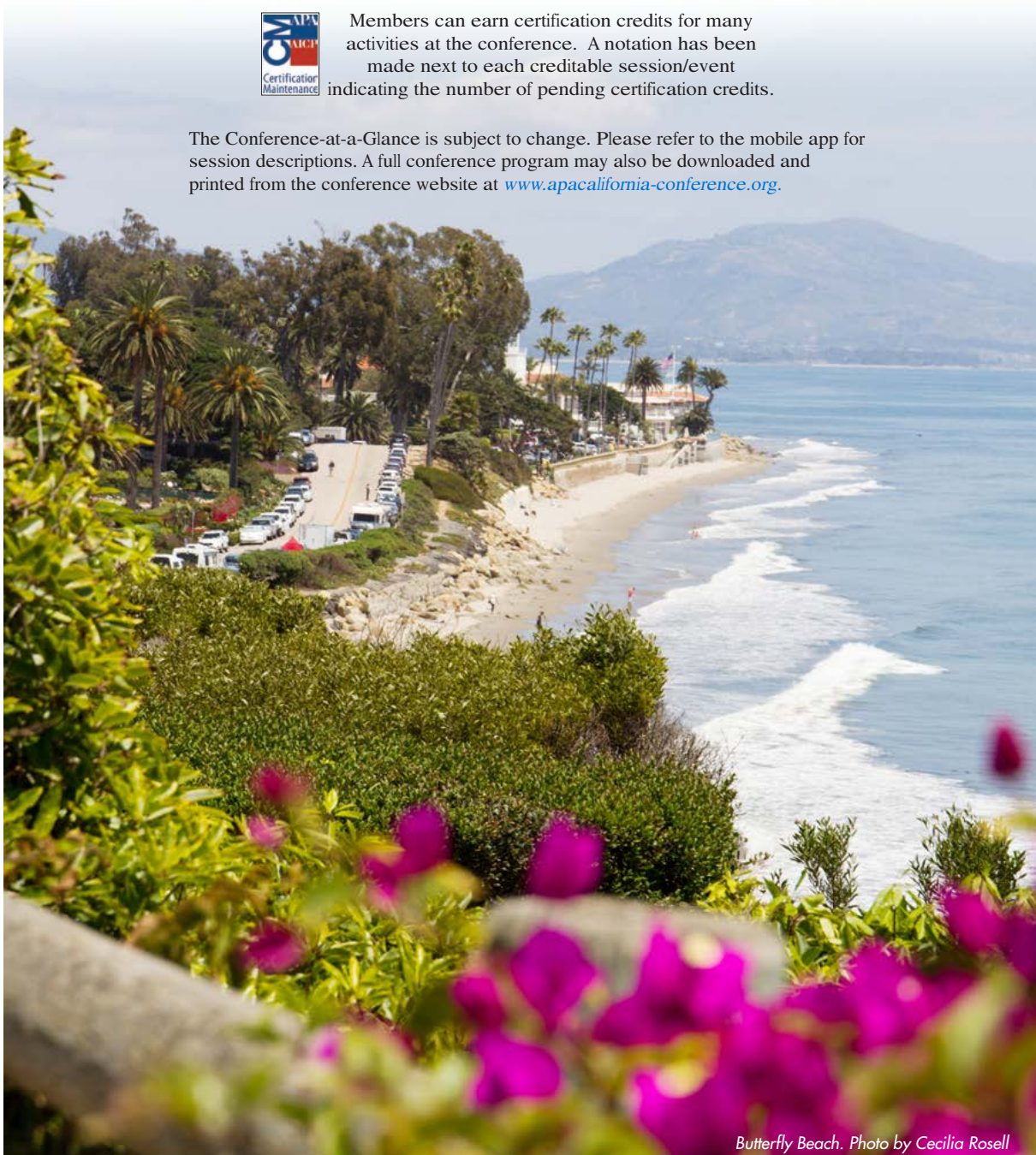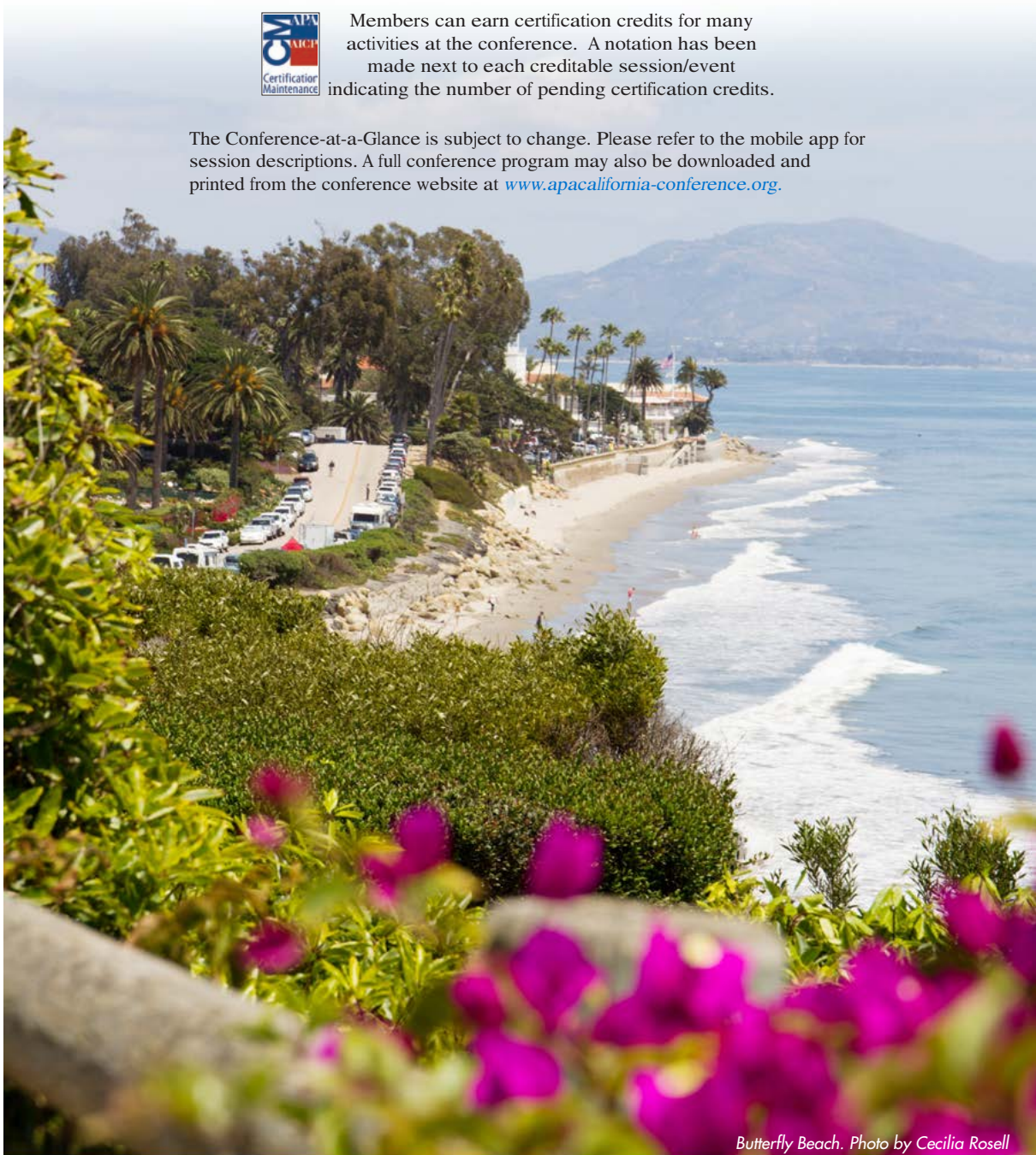
Appendix L

A RESILIENT FUTURE 2019 | CALIFORNIA APA CONFERENCE SANTA BARBARA SEPTEMBER 15-18

www.apacalifornia-conference.org

Members can earn certification credits for many activities at the conference. A notation has been made next to each creditable session/event indicating the number of pending certification credits.

The Conference-at-a-Glance is subject to change. Please refer to the mobile app for session descriptions. A full conference program may also be downloaded and printed from the conference website at *www.apacalifornia-conference.org.*
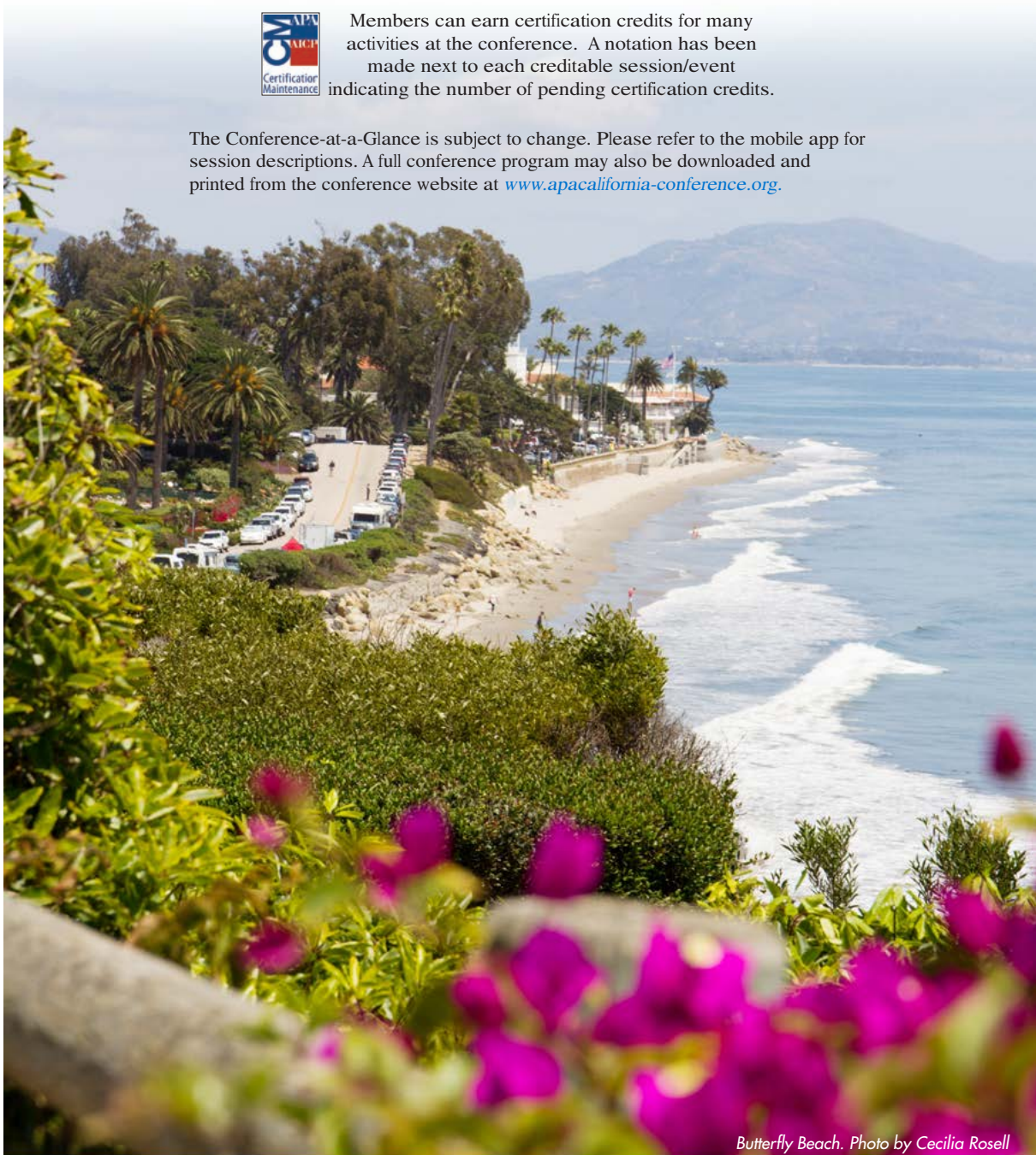
Butterfly Beach. Photo by Cecilia Rosell

Sunday, September 15

A RESILIENT FUTURE 2019 | CALIFORNIA APA CONFERENCE SANTA BARBARA SEPTEMBER 15-18

www.apacalifornia-conference.org

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Butterfly Beach. Photo by Cecilia Rosell

@APACAConf   #APACA2019

Monday, September 16

A RESILIENT FUTURE 2019 | CALIFORNIA APA CONFERENCE SANTA BARBARA SEPTEMBER 15-18

www.apacalifornia-conference.org

Members can earn certification credits for many activities at the conference. A notation has been made next to each creditable session/event indicating the number of pending certification credits.

The Conference-at-a-Glance is subject to change. Please refer to the mobile app for session descriptions. A full conference program may also be downloaded and printed from the conference website at www.apacalifornia-conference.org.

Butterfly Beach. Photo by Cecilia Rosell

Tuesday, September 17

A RESILIENT FUTURE 2019 | CALIFORNIA APA CONFERENCE SANTA BARBARA SEPTEMBER 15-18

www.apacalifornia-conference.org

Members can earn certification credits for many activities at the conference. A notation has been made next to each creditable session/event indicating the number of pending certification credits.

The Conference-at-a-Glance is subject to change. Please refer to the mobile app for session descriptions. A full conference program may also be downloaded and printed from the conference website at *www.apacalifornia-conference.org.*

Butterfly Beach. Photo by Cecilia Rosell

Wednesday, September 18

A RESILIENT FUTURE 2019

CALIFORNIA APA CONFERENCE SANTA BARBARA
SEPTEMBER 15-18

www.apacalifornia-conference.org

Members can earn certification credits for many activities at the conference. A notation has been made next to each creditable session/event indicating the number of pending certification credits.

The Conference-at-a-Glance is subject to change. Please refer to the mobile app for session descriptions. A full conference program may also be downloaded and printed from the conference website at *www.apacalifornia-conference.org.*

Butterfly Beach. Photo by Cecilia Rosell

September 11 - 13	Mobile Workshop #1 - *Channel Islands Overnight Boat Tour* *Additional $295 fee applies. The excursion includes accommodations aboard the Truth (in bunks with privacy curtains), and all meals for the 2-days and 2-nights. It does not include transport to the harbor on Wednesday or from the harbor Friday evening. Rental gear is available at an additional cost on board including snorkels, masks and kayaks. Participants will be provided a packing list, itinerary and island guide tips ahead of the charter.*	CM | 4.0

10:00 am	Exhibit Set Up	*Santa Barbara Ballroom Foyer*
1:00 pm - 9:00 pm	Chapter Board Meeting and Dinner	*Fiesta*

☐ Mobile Workshops   ☐ Student Sessions/Events   ☐ Special Events   ☐ Leadership Meetings

Mobile Workshop #1 - *Channel Islands Overnight Boat Tour*

Time	Session	Location
7:00 am - 6:00 pm	Conference Registration - All registrants	*Santa Barbara Ballroom Foyer*
8:00 am	Exhibitor Set Up	*Santa Barbara Ballroom Foyer*
Student Sessions #1 8:30 am - 9:45 am	Preparing the Planners of the Future	*San Miguel*
	Resilience Starts with Me	*Fiesta*
9:00 am - 12:00 pm	Planning Commission and Board Breakfast Roundtable *(for Planning Commissioners and Public Board Members only)*	*Rodney's Lounge*
Pre-Conference 9:00 am - 3:30 pm	Incorporating Next Generation Technology Into the Comprehensive Planning Workflow: Hands-on Technical Workshop with ArcGIS Urban *Additional $90 fee applies. Lunch included. Attendance is limited.*	**CM | 6.0** *Santa Cruz*
9:00 am - 4:00 pm	Leadership and Management Workshop 2019 *Additional $90 fee applies. Lunch included. Attendance is limited.*	**CM | 6.5** *Santa Rosa*
Student Sessions #2 10:00 am - 11:15 am	An Introduction to the California Environmental Quality Act (CEQA) and Environmental Planning	*San Miguel*
	Interviewing 101: Put Your Best Foot Forward	*Fiesta*
11:30 am - 1:00 pm	California Planning Foundation (CPF) Student Scholarship Awards and Professional Networking Luncheon in Honor of Richard H. Weaver *(pre-registered students and invited guests only)*	*Reagan Room*
Session Block #1 1:00 pm - 2:30 pm	whY-PLAN: The Power of Civic Learning for Resilient Cities and Regions	**CM | 1.5** *Anacapa*
	A Look Back at the Ten Biggest Land Use Victories and Defeats in Santa Barbara Since 1980	**CM | 1.5** *Rodney's Lounge*
	Mainstreaming Climate Adaptation and Mitigation into General Planning Practices: A Long Beach Case Study	**CM | 1.5** *San Miguel*
	The Future of Transportation Electrification in California	**CM | 1.5** *San Rafael*
	Saving the Planet: Making a Difference through Local Government Planning	**CM | 1.5** *Santa Ynez*
	Putting SB 2's Planning Funds to Work for Your Jurisdiction	**CM | 1.5** *Sierra Madre*
2:30 pm - 4:15 pm	Student Walking Tour *(pre-registration required)*	-
Session Block #2 2:45 pm - 4:15 pm	Request for Proposal (RFP) for Results!	**CM | 1.5** *Anacapa*
	A Planner, Pyro-Geographer, and Ian McHarg Walk Into a Bar	**CM | 1.5** *Reagan Room*
	Leadership at the Planning Commission in Spite of Politics and Planning Staff	**CM | 1.5** *Rodney's Lounge*
	Downtown Housing: Back to the Future	**CM | 1.5** *San Miguel*
	Coastal Adaptation Actors: Roles, Perspectives and Lessons Learned	**CM | 1.5** *San Rafael*
	Emerging Transportation Solutions for Vexing Planning Problems	**CM | 1.5** *Santa Ynez*
	Census 2020: Update, Issues, Schedule, and How Planners are Involved	**CM | 1.5** *Sierra Madre*
4:30 pm - 6:00 pm	Diversity Summit - Representation Matters: A Panel on Diversity in the Planning Profession	**CM | 1.5 |** ETHICS *San Rafael and Santa Ynez*
6:00 pm - 9:00 pm	Opening Reception	*Sunken Gardens at the County Courthouse 1100 Anacapa Street*

▢ Mobile Workshops	▢ Student Sessions/Events	▢ Special Events	▢ Leadership Meetings

Time	Event	CM	Location
7:00 am - 6:30 pm	Conference Registration - All registrants		*Santa Barbara Ballroom Foyer*
7:00 am - 8:00 pm	Exhibits Open		*Santa Barbara Ballroom Foyer*
7:00 am - 8:30 am	Continental Breakfast		*Plaza del Sol and Santa Barbara Ballroom Foyer*
8:00 am - 9:30 am	Opening Plenary - TBD -	**CM | 0.0**	*Grand Ballroom*
9:00 am - 11:30 am	Mobile Workshop #2 - *Santa Barbara County's Green-Gold Mine - Cannabis* *Additional $75 fee applies, samples not included.*	**CM | 2.0**	-
Session Block #3 9:45 am - 11:15 am	TerraCount: Model, Assess, and Plan for Resilient Working Lands	**CM | 1.5**	*Anacapa*
	At the Forefront: Work of a Resilience Planning Pioneer	**CM | 1.5**	*Hyatt - El Cabrillo*
	Transforming Land Banks Into Housing Solutions	**CM | 1.5**	*Hyatt - La Cantina*
	Re-thinking State Street: Making it Work Now and In the Future	**CM | 1.5**	*Reagan Room*
	GIS is Not Just for Mapping Anymore: Collaborate and Build Consensus Using Interactive Web-based GIS Tools and Technology	**CM | 1.5**	*Rodney's Lounge*
	Bay Area Approaches to Equitable Planning	**CM | 1.5**	*San Miguel*
	APA California Sections: Collaborative Planning and Regional Case Studies *(Section Directors Session)*	**CM | 1.5**	*San Rafael*
	Options for Paying for Climate Adaptation in California: Policy and Practice	**CM | 1.5**	*Santa Cruz*
	The Shifting Sands of Economic Development: Welcome to the 'O'-Zone	**CM | 1.5**	*Santa Rosa*
	APA California 2019 Legislative Update	**CM | 1.5 |** LAW	*Santa Ynez*
	Linking Jobs Growth with Housing Needs	**CM | 1.5**	*Sierra Madre*
11:15 am - 1:15 pm	Lunch on Your Own		-
11:30 am - 12:15 pm	California Planning Roundtable Meeting		*Fiesta*
12:00 pm - 5:00 pm	Mobile Workshop #3 - *From Grapes to Glass: Vineyards, Wineries, and Tasting Rooms of the Santa Ynez Valley - Additional $65 fee applies, lunch provided.*	**CM | 3.0**	-
	Mobile Workshop #4 - *Industrial Tourism* *Additional $65 fee applies, lunch provided.*	**CM | 2.5**	-
1:00 pm - 5:00 pm	Mobile Workshop #5 - *Innovative High-Density Housing - Responding to California's Housing Crisis - Additional $45 fee applies.*	**CM | 3.0**	-
	Mobile Workshop #6 - *The Missing Middle Housing Walking Tour: Documenting Medium Density, House-Scale Building Types - Additional $45 fee applies.*	**CM | 4.0**	-
Session Block #4 1:15 pm - 2:45 pm	Bike Lanes, Sidewalks, and Highway Expansion: Re-imagining Highway 101	**CM | 1.5**	*Anacapa*
	We Are All Tech Towns: How Planners Are Adapting to the New Normal	**CM | 1.5**	*Hyatt - El Cabrillo*
	It's Not the Same Old, Same Old--Planning Innovations to Address Climate Change	**CM | 1.5**	*Hyatt - La Cantina*
	Economic Resiliency: Building Long Term Strength as well as Disaster Response	**CM | 1.5**	*Reagan Room*
	Adapting to Changing Realities: Strategic Skills to Achieve Project Success - *Part 1* *(CPR Session)*	**CM | 1.5**	*Rodney's Lounge*
	A Tale of Three Cities: Resiliency in Southern California	**CM | 1.5**	*San Miguel*

Mobile Workshops   Student Sessions/Events   Special Events   Leadership Meetings

Session Block #4 1:15 pm - 2:45 pm	How Can Planners Take a Leadership Role on Housing Issues? *(CPR Session)*	**CM | 1.5** *San Rafael*
	Set the Compass for Coastal Resilience: Aligning Local Planning Efforts to Sail Toward Adaptation	**CM | 1.5** *Santa Cruz*
	Creating Tomorrow's Planning Leaders	**CM | 1.5** *Santa Rosa*
	President's Workshop on Diversity and Social Equity *Chapter President's Session - Part 1*	**CM | 1.5 |** ETHICS *Santa Ynez*
	Air Pollution and Public Heath? The Friant Ranch Conundrum	**CM | 1.5 |** LAW *Sierra Madre*
2:00 pm - 5:00 pm	Mobile Workshop #7 - *Gaviota and Around Platform Holly by Boat* *Additional $65 fee applies. Food and beverages available for purchase on board.*	**CM | 2.0** -
2:45 pm - 3:15 pm	Break	*Ballroom Foyers*
3:15 pm - 4:45 pm	Planners Emeritus Networking (PEN) Meeting	*Fiesta*
Session Block #5 3:15 pm - 4:45 pm	Emerging Tools: Make Better Decisions, Empower Staff, and Build Public Trust	**CM | 1.5** *Anacapa*
	Managing the Planning Office of the Future	**CM | 1.5** *Hyatt - El Cabrillo*
	A Rising Tide Lifts All Boats: Improving Equity and Opportunity in Regional Resilience Planning	**CM | 1.5** *Hyatt - La Cantina*
	Adapting to Changing Realities: Strategic Skills to Achieve Project Success - *Part 2 (CPR Session)*	**CM | 1.5** *Rodney's Lounge*
	No Dust on these Plans! How to Move from Planning to Implementation to Deliver Active Transportation Improvements	**CM | 1.5** *San Miguel*
	Opportunities for Community/Military Partnerships to Enhance Resilience	**CM | 1.5** *Santa Cruz*
	The ABCs of AB52	**CM | 1.5 |** LAW *Santa Rosa*
	Women in Planning: Resilient Leadership	**CM | 1.5** *Santa Ynez*
	Unintended Exclusion in Inclusionary Housing? Partnering with the State to Address the Housing Crisis	**CM | 1.5** *Reagan Room*
	President's Workshop on Diversity and Social Equity *Chapter President's Session - Part 2*	**CM | 1.5 |** ETHICS *Sierra Madre*
5:00 pm - 6:15 pm	APA California Chapter Awards Event	*San Rafael*
6:30 pm - 8:00 pm	California Planning Foundation (CPF) Online Auction Fundraiser Celebration and Reception in Honor of Virginia Viado and Ted Holzem	*Reagan Room*
8:00 pm	Consultant-Hosted Private Receptions	
8:00 pm	Students and Emerging Planners Mixer	*Third Window Brewing* *406 E Haley Street, #3, Santa Barbara, 93101*

Mobile Workshop #7 - *Gaviota and Around Platform Holly by Boat*

■ Mobile Workshops   ■ Student Sessions/Events   ■ Special Events   ■ Leadership Meetings

Time	Session		
7:00 am - 6:30 pm	Conference Registration - All registrants		*Santa Barbara Ballroom Foyer*
7:00 am - 8:00 pm	Exhibits Open		*Santa Barbara Ballroom Foyer*
7:00 am - 8:30 am	Continental Breakfast		*Plaza del Sol and Santa Barbara Ballroom Foyer*
Session Block #6 8:00 am - 9:30 am	Community-Building Through the General Plan	**CM | 1.5** *Anacapa*	
	Little Saigon: The Future Meets the Past	**CM | 1.5** *Hyatt - El Cabrillo*	
	Demystifying Greenhouse Gas Offsets	**CM | 1.5** *Hyatt - La Cantina*	
	Extraordinary Events Require Collaborative Responses: Rebuilding and Lessons Learned from the Montecito Debris Flow	**CM | 1.5** *Reagan Room*	
	The Game is On! Game Design for Outstanding Community Engagement	**CM | 1.5** *Rodney's Lounge*	
	The Future of Mobile Home Parks in California: Preserve, Expand, or Redevelop?	**CM | 1.5** *San Miguel*	
	What to Expect When You're Expecting, A Dockless Future	**CM | 1.5** *San Rafael*	
	Sustainable Community Strategy Implementation: Fact or Fiction?	**CM | 1.5** *Santa Cruz*	
	From Here to There: Navigating Career Milestones	**CM | 1.5** *Santa Rosa*	
	2019 CEQA Update	**CM | 1.5 |** LAW *Santa Ynez*	
	Zoning Zen: New Ways to Address Complex Land Use Issues	**CM | 1.5** *Sierra Madre*	
8:00 am - 11:30 am	Mobile Workshop #8 - *Ellwood-Devereux Open Space: Multi-Jurisdictional Planning, Management, and Restoration* *Additional $45 fee applies. Light snacks and water provided.*	**CM | 3.0** -	
8:00 am - 1:00 pm	Mobile Workshop #9 - *Ventura Wellness District* *Additional $65 fee applies. Lunch at local restaurant provided.*	**CM | 4.0** -	
8:30 am - 11:30 am	Mobile Workshop #10 - *Santa Barbara Desalination Plant and Wastewater Treatment Plant - Additional $35 fee applies.*	**CM | 2.0** -	
Session Block #7 9:45 am - 11:15 am	Biology 101 for Planners: How to Turn Biological Constraints Into Project Assets	**CM | 1.5** *Anacapa*	
	Public Art + Creative Placemaking: The Next Generation	**CM | 1.5** *Hyatt - El Cabrillo*	
	Climate Action Planning with New State Guidelines	**CM | 1.5 |** LAW *Hyatt - La Cantina*	
	Kahoot: Ethics Edition!	**CM | 1.5 |** ETHICS *Reagan Room*	
	The Contested Curbside in the Age of Emerging Technology: A Design Sprint	**CM | 1.5** *Rodney's Lounge*	
	Enough about 743, How do I Implement It?	**CM | 1.5** *San Miguel*	
	Got Sites? Getting Ready for Sixth Cycle Housing Elements	**CM | 1.5 |** LAW *San Rafael*	
	Aim For the Stars! Why Some Communities Want to Stay in the Dark	**CM | 1.5** *Santa Cruz*	
	Social Equity as Part of Cannabis Licensing Programs	**CM | 1.5** *Santa Rosa*	

☐ Mobile Workshops   ☐ Student Sessions/Events   ☐ Special Events   ☐ Leadership Meetings

Session Block #7 9:45 am - 11:15 am	Climate Action Plans: Are They Making a Difference or Just Satisfying Regulations? *(PEN Session)*	**CM | 1.5** *Santa Ynez*
	How Next Generation Utilities Can Support the Rise of Smart Cities	**CM | 1.5** *Sierra Madre*
11:30 am - 1:30 pm	Connect! Networking Luncheon	*Plaza del Sol*
1:00 pm - 4:30 pm	Mobile Workshop #11 - *Urban Bike Tour* *Additional $45 fee applies. Approximately 7.5 miles, flat terrain, bike & helmet included.*	**CM | 3.0** -
Session Block #8 1:30 pm - 3:00 pm	Five Years of Vision Zero: A Look Back and a Look Ahead	**CM | 1.5** *Anacapa*
	Coastal Conundrums in a Changing Climate - *Part 1*	**CM | 1.5 | LAW** *Hyatt - El Cabrillo*
	Boundaryless Adaptation: How to Achieve the Collaborative Mindset Needed for Resiliency	**CM | 1.5** *Hyatt - La Cantina*
	The Many Ways to Skin a Cat: CEQA Streamlining in Practice	**CM | 1.5 | LAW** *Reagan Room*
	Open Place Planning: Taking Outreach to the Streets	**CM | 1.5** *Rodney's Lounge*
	The Write Stuff: Successful Grant Applications and Their Benefits	**CM | 1.5** *San Miguel*
	Out of the Ashes: Planning for Fire Hazards and Recovery	**CM | 1.5** *San Rafael*
	Our County Los Angeles: Inclusive Engagement for an Equitable Sustainability Plan	**CM | 1.5** *Santa Cruz*
	The City of Goleta Honors its Living History Through Historic Preservation	**CM | 1.5** *Santa Rosa*
	By Right, Right? Principles for Crafting Context-Sensitive, By-Right Housing Regulations *(CPR Session)*	**CM | 1.5** *Santa Ynez*
	Updating Your Zoning Code: Overcoming Challenges	**CM | 1.5** *Sierra Madre*
3:00 pm - 3:15 pm	Break	*Ballroom Foyers*
Session Block #9 3:15 pm - 4:45 pm	Historic Preservation in the New Era of Infill Housing and Renewable Energy	**CM | 1.5** *Anacapa*
	Coastal Conundrums in a Changing Climate - *Part 2*	**CM | 1.5 | LAW** *Hyatt - El Cabrillo*
	All Together Now! Climate Adaptation Planning at Multiple Levels for Natural and Built Environments in the Santa Barbara Area	**CM | 1.5** *Hyatt - La Cantina*
	Passing the AICP Exam: Who Wants to be a Certified Planner?	**CM | 1.5** *Reagan Room*
	Surviving Disasters: A Resiliency Planning Game	**CM | 1.5** *Rodney's Lounge*
	City and TNC Collaboration? A Case Study	**CM | 1.5** *San Miguel*
	Reaching the Loudest and Quietest Voices: A Dignity-Infused, Data-Driven Approach to Community Engagement in Los Angeles	**CM | 1.5** *Santa Rosa*
	Zoning Hacks for Missing Middle Housing	**CM | 1.5** *Santa Cruz*
	Walking the Walk: Implementing Adaptation and Resilience Equity Strategies	**CM | 1.5** *Santa Ynez*
	CEQA in the Age of By-Right Housing: A Wine Country Case Study	**CM | 1.5 | LAW** *Sierra Madre*
5:00 pm - 6:30 pm	Consultants' Reception	*Plaza del Sol*
7:00 pm	Consultant-Hosted Private Receptions	

Mobile Workshops   Student Sessions/Events   Special Events   Leadership Meetings

CONFERENCE-AT-A-GLANCE
Wednesday, September 18

The Conference-at-a-Glance is subject to change. Please refer to the mobile app for session descriptions. A full conference program may also be downloaded and printed from the conference website at www.apacalifornia-conference.org.

A RESILIENT FUTURE | CALIFORNIA APA CONFERENCE
2019 SANTA BARBARA
SEPTEMBER 15-18

7:00 am - 8:30 am	Continental Breakfast	*Plaza del Sol*
Session Block #10 8:00 am - 9:30 am	The American Front Yard in a Changing World	**CM | 1.5** *Anacapa*
	Retrospective Evaluation of General Plans: Is your General Plan Working?	**CM | 1.5** *Reagan Room*
	Reinventing Suburban Retail in the Face of Digital Disruption	**CM | 1.5** *Rodney's Lounge*
	Putting Hope in Homelessness	**CM | 1.5** *San Miguel*
	Property Rights, Takings, Exactions, and More: A Legal and Practical Update for Planners	**CM | 1.5 |** LAW *San Rafael*
	Using Consultants in Unconventional Ways	**CM | 1.5** *Santa Cruz*
	Planning for Success: Inclusive Engagement in Diverse Communities	**CM | 1.5** *Santa Rosa*
	Fire and Floods: The Practical and Policy Implications of Rebuilding After Natural Disasters - *Part 1*	**CM | 1.5** *Santa Ynez*
	SB 743: Where is the Safety?	*Sierra Madre*
8:00 am - 2:00 pm	Exhibit Tear Down	*Santa Barbara Ballroom Foyer*
8:30 am - 12:00 pm	Mobile Workshop #12 - *Santa Barbara County Disaster Response & Recovery* *Additional $45 fee applies.*	**CM | 3.0** -
8:30 am - 3:30 pm	Mobile Workshop #13 - *Dangermond Preserve* *Additional $85 fee applies, lunch included.*	**CM | 5.0** -
9:30 am - 12:30 pm	Mobile Workshop #14 - *Lotusland* *Additional $75 fee applies.*	**CM | 2.0** -
Session Block #11 9:45 am - 11:15 am	Planning and Land Use Challenges Unique to Cannabis Cultivation	**CM | 1.5** *Anacapa*
	The Game of Ethics: Battle of the Sectors	**CM | 1.5 |** ETHICS *Reagan Room*
	It's Not a Mirage: Eliminating Child Care Deserts Together	**CM | 1.5 |** LAW *Rodney's Lounge*
	No Easy Answers: A Community-led Plan in a Political Environment	**CM | 1.5** *San Miguel*
	Water, Health, Equity and Engagement in Frontline Communities	**CM | 1.5** *Santa Cruz*
	Planning in the Santa Maria Valley: Maintaining Small Town Roots While Preparing for the Future	**CM | 1.5** *Santa Rosa*
	Fire and Floods: The Practical and Policy Implications of Rebuilding After Natural Disasters - *Part 2*	**CM | 1.5** *Sierra Madre*
11:30 am - 12:45 pm	Closing Plenary - *Resiliency in a Time of Unprecendented Change* *Kate Meis, Executive Director, Local Government Commission*	**CM | 0.0** *San Rafael and Santa Ynez*
1:00 pm - 4:00 pm	Mobile Workshop #15 - *The Past, Present, and Future of Cabrillo Boulevard* *Additional $35 fee applies.*	**CM | 2.0** -

☐ Mobile Workshops   ☐ Student Sessions/Events   ☐ Special Events   ☐ Leadership Meetings

Appendix M
2019 Conference Production Schedule
Updated: January 6, 2019

Color Coding: **Program Sessions**
Mobile Workshops
Opening Reception
Conference Website and Registration

December/January **Program Subcommittee:** set up process for reviewing session submittals and recruit reviewers

January **Laura:** set up training for reviewers of online scoring system

January 14-April 30 **Hanson, Francine:** work with Vieth Consulting to redesign conference website and set up online registration

January 31 **DEADLINE for Session Proposals**

February 1–March 31 **Program Subcommittee:** review and recommend sessions; contact session organizers as needed to adjust sessions

Mobile Workshops Subcommittee: organize, set price and draft write-up for mobile workshops

Opening Reception: draft write-up for event

Deene: draft hotel reservation information

April 1- April 30 **VP Professional Development:** review session recommendations
Program Subcommittee finalize selection of sessions
ALL: select sessions for recording
Laura: notify session organizers of accepted/rejected sessions
Program Subcommittee: assign sessions to Session Blocks; draft Conference-at-a-Glance
Kacey (Conference Program Coordinator): coordinate preparation of Conference-at-a-Glance for posting (Dorina prepares final version)

Dorina: prepare Mobile Workshops Announcement

Dorina: prepare Opening Reception Announcement

Dorina: prepare hotel reservation information

Hanson, Francine: Beta test conference website and online registration program

April 30 (Deadline)	**Redesigned conference website goes LIVE!**
	Francine: post Conference-at-a-Glance
	Francine: post Mobile Workshops Announcement
	Francine: post Opening Reception Announcement
	Francine: post hotel reservation information
May 1	***EARLY REGISTRATION OPENS***
May-July	**Kacey:** coordinate preparation of Sessions Descriptions for posting on website
June 14	***END OF EARLY REGISTRATION***
July	**ALL:** Site Visit #3 – final walk thru
	ALL: Budget check
	Program Subcommittee: assign session rooms
July 31	**Francine:** post Session Descriptions
August 16	***END OF REGULAR REGISTRATION***
	Program Subcommittee: deadline for revisions to Session Descriptions
	Mobile Workshops Subcommittee: determine if any workshops should be cancelled or modified (e.g. bus size)
September 2	**Opening Reception:** finalize arrangements (also other food events)
September 15-18	***2019 CONFERENCE***

<u>Not Shown:</u>   Announcements of Opening and Closing Keynote Speakers prepared and posted once confirmed.

American Planning Association
California Chapter
Making Great Communities Happen

RELEASE TO RECORD FORM FOR DISTANCE EDUCATION SESSIONS

APA California Chapter 2019 Conference
Hilton Santa Barbara Beachfront Resort
September 15-18, 2019

SESSION TITLE: _____

SESSION BLOCK (day & time): _____

MODERATOR (on behalf of other speakers): _____

I am the Moderator of a session being presented at the APA California annual Chapter conference. I give the Chapter permission, on behalf of the members of my panel, to record my session as part of a Chapter effort to provide Distance Education to members who were not in attendance at the conference.

I also give APA California permission to use the PowerPoint presentations from this session as the visual component of the Distance Education session. I have already received permission to use any material in the presentations that is copyrighted and I allow this permission to be utilized by APA California for the benefit of its members.

Moderator's Signature: _____

Title/Organization: _____

Cell Phone (to reach you at Conference): _____

Email address: _____

Date: _____

PLEASE EMAIL SIGNED FORM BACK TO FRANCINE FARRELL at ategoresources@live.com

THANK YOU FOR YOU PARTICIPATION IN THIS PROGRAM!!

MODERATOR INFORMATION FOR PARTICPATING IN APA CALIFORNIA ANNUAL CONFERENCE DISTANCE EDUCATION PROGRAM FOR CHAPTER MEMBERS

Thank you for participating in the APA California Program to record annual conference sessions for future Distance Education for APA California members. Please follow the following instructions for preparing and submitting presentations and for conducting your session.

SESSION PRESENTATIONS

- Rather than using your own laptop computer, we will load your presentations onto a conference laptop configured to send PowerPoint screen images to a recording computer. Please also bring a thumb drive and your computer loaded with your PowerPoint presentations as a back-up.

- **Francine Farrell** will provide you a Dropbox link for uploading your presentations. Only Moderators will receive an "invitation" by email from Dropbox. The Speakers do not receive this invitation. Please contact Francine if you have any problems or questions.

- Moderators are responsible to gather all Speaker presentations and combine them into <u>one</u> PowerPoint presentation.

- To assist us with identifying the sessions, each file is to be labeled as shown below in order; and, separated with an underscore after each segment; otherwise, the upload may fail:

  - Date (ddmmmyy) and time of Session, first;
  - Name of Session; and,
  - Title of Session

  Example: 21OCT14_845AM_Workforce_&_RentalHsg_SantaBarbaraDesignCharette_ACaseStudy

- **Please upload your presentations by Friday, September 13**. We know that last minute changes are sometimes necessary, but it is important that we have final PowerPoint presentations by this date. After Friday, October 5, if you must make changes to your PowerPoint presentations, please alert Francine immediately.

- PowerPoint presentations should include a photo and caption for each speaker. This will help distance learners connect with the speakers.

- Please provide your PowerPoint in ".pps" format if possible. If you are unable to use that format, provide in ".ppt" format instead.

- As is APA California's practice, PowerPoint presentations should not be printed for distribution. Conference attendees will be able to retrieve presentations from the APA California website in about two weeks following the conference.

SESSION INSTRUCTIONS

- Moderators and speakers should arrive at their assigned session room at least 10 minutes before the session. (Note: there is a 15-minute break between sessions). For sessions located in Grande Ball Room A, **Greg Konar** will be managing the recording of sessions and will be available to give you final instructions.

- Please indicate to attendees that the session is being recorded by APA California for future Distance Education opportunities for Chapter members as part of a program to expand opportunities for AICP CM credit.

- Please discuss with your speakers prior to your session that the session will be recorded. Indicate that they should introduce themselves when they begin and that they should use microphones when speaking.

- Please instruct audience members who ask questions during the Q&A period that we record the Q&A part of the session also. Ask them to use the microphone and keep their questions short. Indicate that you or a panelist may need to repeat the question to capture it for the audio recording.

FOR ANY QUESTIONS, PLEASE EMAIL FRANCINE FARRELL at ategoresources@live.com

APPENDIX P
SAMPLE FORMS/TEMPLATES FOR   MOBILE WORKSHOPS

SAMPLE MW LISTING FOR MONITORING & CONFERENCE COORDINATOR & BUS

MW Coordinator can use this form to keep track of MWs; can be distributed to MW leaders during time leading up to the conference; Conference Session Submission Form should contain detailed route info or provide on separate sheet.

Mobile Workshops w/Times, Transportation Needs & Extra Costs Revised X/X/X

MW#	Title/ # Sign-ups/ # guides on bus/Contact & #	Phrase Descriptors & Leaders/Participants	Time/ Length/ CM	Transportation Details & Extra Costs
TUESDAY				
	TUESDAY ALL-DAY MOBILE WORKSHOPS #2 & #3 (deleted 1 & 4)				
1	DELETED				
2	TODs & Transit on the San Diego Trolley Line 25 signups - **LIMIT TO 25** 2-4 guides on bus Name & Cell #	Phrase Descriptor MW Leader & contact email Other Guides & contact email	10:30 am – 3:00 pm 4.5 hours total **(4.5 CM)**	Transport & from to Coaster; ride MTS trolley lines *$5 pp cost for trolley* *Reimburse SANDAG for lunch & trolley*
3	Borders, Barriers & Beaches: International Interactions (So. San Diego) 13 signups 3 guides on bus Name & Cell #	Phrase Descriptor MW Leader & contact email Other Guides & contact email	10:30 am – 5:30 pm 7.0 hours total **(6.0 CM)**	Bus available during whole tour; stepping on and off *Reimburse to MW leader for Mexican food lunch*
4	DELETED				
	WEDNESDAY MORNING MOBILE WORKSHOPS #5, #6 & #7				
5	Transformation of the Naval Training Center into the Liberty Station Community 8 signups 1 guide on bus Name & Cell #	Phrase Descriptor MW Leader & contact email Other Guides & contact email	8:00 am – 12 noon 4 hours total **(4.0 CM)**	Bus to and from Liberty Station; walking around site
6	Carlsbad Habitat Preserve, Lagoons, and Desalination Project Tour 11 signups 4 guides on bus Name & Cell #	Phrase Descriptor MW Leader & contact email Other Guides & contact email	8:00 am – 12 noon 4 hours total **(4.0 CM)**	Bus available whole tour; stepping on & off *$5 pp donation pp for docent tour*
7	Transit in the Suburbs 18 signups 2 guides on bus Name & Cell #	Phrase Descriptor MW Leader & contact email Other Guides & contact email	8:00 am – 12 noon 4 hours total **(4.0 CM)**	Bus to west end of Sprinter route in Oceanside; take Sprinter east to Escondido; take bus back west along the route stopping at ~3 project sites *(Sprinter tickets donated@ no cost by NCTD)*

WEDNESDAY AFTERNOON MOBILE WORKSHOPS #8 & #10 (deleted 9)				
8	Sustainability Planning in San Diego's Coastal Towns 11 signups 2 guides on bus Name & Cell #	Phrase Descriptor MW Leader & contact email Other Guides & contact email	2:00 pm – 6:00 pm 4 hours total (4.0 CM)	Bus for entire trip; potential stepping on and off
9	DELETED			
10	Downtown San Diego 9 signups 1-2 guides on bus Name & Cell #	Phrase Descriptor MW Leader & contact email Other Guides & contact email	2:00 pm – 6:30 pm 4.5 hours total (4.5 CM)	Bus transport to downtown & during tour – walking during tour. Return to La Costa after tour; otherwise join Pub Crawl participants on busses back at no extra charge beyond MW cost

APPENDIX Q
APA California Sustainability Principles for Conferences

The Chapter has adopted sustainability policies to demonstrate our commitment and efforts to promote sustainability in all facets of conference planning. To that end conference hosts should make every effort to promote sustainability principals when: making material purchases, food selections and catering options, transportation options, waste management decisions and venue services.

Conference Host Committees have endorsed the following types of objectives:

- Minimize waste generated from the conference, including waste from written conference materials, catering and conference operations
- Encourage sustainable practices by the conference host third party vendors, sponsors and exhibitors and conference attendees

Calculate and reduce the carbon footprint of the conference by reducing greenhouse gas emissions generated from transportation related to the conference.

Appendix R
Announcement & Sponsor Acknowledgements

Sunday, September 15, 11:45 am - 1:00 pm

CPF Student Awards Luncheon

Up to 10 minutes for announcements

Julia Lave Johnston, APA California President (3 minutes)

o Welcome students
o Provide a brief status on Chapter items for students
o Introduce Student Representative Valeria Diaz

Valeria Diaz, Student Representative (3 minutes)

o Highlight student activities at conference:
   • Headshots (Sunday afternoon)
   • Walking Tour (Sunday, 2:30 pm)
   • Students and Emerging Planners Mixer (Monday, 8:00 pm, Third
     Window Brewing)
   • Networking Lunch (Tuesday, 11:30 am – 1:15 pm)
   • Leadership Reception (Tuesday, 3:30 pm – 4:45 pm)
o Introduce Juan Borrelli, CPF President (or designee)

Juan Borrelli or designee

o Acknowledge Student Awards Luncheon sponsors (show slide)
   • **4 Leaf**
   • **AES (Analytical Environmental Services)**
   • **Brownstein Hyatt Farber Schreck**
   • **McNulty Consulting**
   • **USC Sol Price Department of Urban Planning and Spatial
     Analysis**
   • **Wildlands**
o CPF Online Auction
o Present program

End of Session: **Juan or designee**

o Acknowledge Student Awards Luncheon sponsors again (show slide)

Sunday, September 15, 4:30 pm - 6:00 pm

Diversity Summit

Run slides of ALL conference sponsors before start of event

Up to 15 minutes for announcements

Julia Lave Johnston, APA Chapter President (5 minutes)

o Welcome
o Introduce Joel Albizo, Chief Executive Officer, APA
Joel Albizo has more than 30 years of association management experience and is seen as an innovator within the association CEO community. In addition to original research and presentations on the competencies and development of future association CEOs, he is attuned to digital transformation and other trends impacting the nonprofit sector. Previously, he served as CEO for the Council of Landscape Architectural Registration Boards (CLARB), a regulatory body that works to protect the public's health, safety, and welfare by establishing licensure standards for the practice of landscape architecture. He is president of the Federation of Associations of Regulatory Boards, and a former board member and treasurer for the American Society of Association Executives.

Joel Albizo, Chief Executive Officer, APA (5 minutes)

Tess Harris, 2019 CHC Co-Chair (5 minutes)

o Welcome
o Acknowledge Major Conference and Diversity Summit sponsors
   Major Conference Sponsors:
   • **Dudek** – Lanyard
   • **ESA (Environmental Services Associates)** – Beach Mat
   • **Esri** – CPF Auction
   Diversity Summit Sponsor:
   • **Ascent Environmental**
o Highlight conference activities, e.g.:
   o Download Mobile App
   o CPF Online Auction
   o Opening Reception extra drink tickets
o Introduce Denice Thomas/Tanner Shelton

Denice Thomas/Tanner Shelton, Diversity Summit Moderators (75 minutes)

o Diversity Mixer (Tuesday, September 17, 6:30 pm, Dargan's Irish Pub)
o Introduce Session
o Introduce Speakers/Panelists

End of Session:

o Diversity Moderator acknowledges sponsors again

Sunday, September 15, 6:00 pm - 9:00 pm

Opening Reception

Hollee King, Open Reception Chair

(back-up Jeff Wilson, 2019 CHC Co-Chair)

o Welcome

o Acknowledge Opening Reception sponsors
  - **Caltrans**
  - **CSG Consultants**
  - **General Code**
  - **Oracle**
  - **Urban Footprint**

Monday, September 16, 8:00 am – 9:30 am
Opening Plenary/Keynote

Run slides of ALL conference sponsors before start of event

Reserve front rows for CHC Co-Chairs, APA Chapter Board, Senator Wiener, Senator Wiener Aide, other special guests

Up to 30 minutes for starting and ending announcements

Julia Lave Johnston, APA California President (10 minutes)
o   Welcome message
o   Introduce special guests in attendance (TBD)
o   Award to Pete Parkinson, Past President & other past 2018 Elected Board Directors
o   Introduce Chapter Board (invite to stand)
o   General announcements
o   Chapter President's session
o   Introduce Joel Albizo, Chief Executive Officer, APA

Joel Albizo, Chief Executive Officer, APA (5 minutes)

Tess Harris, 2019 CHC Co-Chair (8 minutes)
o   Acknowledge Major Conference and Opening Plenary/Keynote sponsors
        Major Conference Sponsors:
        • **Dudek** – Lanyard
        • **ESA (Environmental Services Associates)** – Beach Mat
        • **Esri** – CPF Auction
        Opening Plenary/Keynote Sponsors:
        • **Civic Solutions**
        • **Kimley-Horn**
        • **KTGY Architecture + Planning**
        • **PlaceWorks**
        • **RRM Design Group**
        • **Urban Planning Concepts**
        • **VCS Environmental**
o   Introduce Conference Host Committee (invite to stand)
o   Conference announcements (download Mobile App)
o   Awards Ceremony complimentary drink ticket
o   CPF Online Auction

Bret McNulty, 2019 CHC Co-Chair (2 minutes)
o   Introduce Senator Scott Wiener, State Senate District 11

OPENING KEYNOTE: STATE SENATOR SCOTT WIENER (60 minutes)

End of session: **Jeff Wilson, 2019 CHC Co-Chair (5 minutes)**
o   Acknowledge Major Sponsor and Opening Plenary sponsors again
o   Closing announcements

Monday, September 16, 5:00 pm – 6:15 pm

APA California Awards Ceremony

Run slides of ALL conference sponsors before start of event

Reserve front rows for awardees and presenters

Julia Lave Johnston, APA California President (5 minutes)
o Welcome
o Acknowledge Awards Ceremony Sponsors:
   • **Goldfarb & Lipman LLP**
   • **Lisa Wise Consulting**
   • **MIG**
   • **Page**
   • **Rick Community Planning**
o Complimentary drink ticket to be distributed at end of ceremony
o Chapter President's Award (TBD)
o Introduce John Hildebrand, California Great Places Awards Coordinator & Inland Empire Section Director

John Hildebrand, California Great Places Awards Coordinator (3 minutes)
o Acknowledge APA national Great Places Award (if any)
o Announce APA California Great Places Awards
o Introduce Derek Wong, VP for Administration

Derek Wong, VP for Administration
o Introduce Awards Program
o Introduce Chapter Awards Coordinators – Chris Pahule & Shane Burkhardt
o Start Awards Presentation, including:
   o 2019 APA National Award winners from California
   o CPF Student Scholarship Recipients
   o PEN Honorees
   o Landmark Award

Chris Pahule and Shane Burkhardt, Chapter Awards Coordinators
o Emcee 2019 APA California Awards Presentation

End of session: **Chris or Shane (2 minutes)**
o Acknowledge Awards Ceremony sponsors again
o Reminder about comp drink tickets for use at CPF Reception or Consultants' Reception

Monday, September 16, 6:30 pm – 8:00 pm

CPF Reception/Auction

Run slides of ALL conference sponsors before start of auction

CPF Emcees: Juan Borrelli, Aaron Pfannenstiel and Terry Blount

o Acknowledge CPF Reception/Auction sponsors at beginning and end of event

- **Esri** – Auction
- **EMC Planning Group** - Reception
- **Michael Baker International** – Reception
- **Mintier Harnish** - Reception

Monday, September 16, 8:00 pm

Students and Emerging Planners Mixer

Valeria Diaz, Student Representative

o Announce Students and Emerging Planners Mixer sponsors:

- **Alta Planning & Design**
- **City of San Luis Obispo**
- **Jensen Design & Survey**

Wednesday, September 18, 11:30 am - 12:45 pm

Closing Plenary

Run slides of ALL conference sponsors before start of event

Reserve front tables for CHC Co-Chairs, APA Chapter Board, Kate Meis, other special guests

Up to 20 minutes for starting and ending announcements

Julia Lave Johnston, APA California President (5 minutes)
o Acknowledge any special guests in attendance
o Acknowledge Major Conference and Closing Plenary sponsors
    Major Conference Sponsors:
- **Dudek** – Lanyard
- **ESA (Environmental Services Associates)** – Beach Mat
- **Esri** – CPF Auction

    Closing Plenary Sponsors:
- **California Department of Conservation**
- **Rincon Consultants**
- **Stantac Consulting Services**
- **Suzanne Elledge Planning & Permitting Services**

o Thank conference attendees, VP Conference, Conference Program Coordinator, APA contractors and staff
o Presentation of plaques to 2019 Conference Co-Chairs
o Introduce Woodie Tescher and Vivian Kahn

Woodie Tescher and Vivian Kahn (2 minutes)
o Stanley R. Hoffman Remembrance
o Introduce Paul Wack, Conference Committee Member

Paul Wack, Conference Committee Member (3 minutes)
o Introduce Kate Meis, Executive Director, Local Government Commission

CLOSING KEYNOTE: KATE MEIS (55 minutes)

End of Session: **(10 minutes)**

2019 CHC Co-Chairs
o Acknowledge Major Conference and Closing Plenary sponsors again
o Closing conference comments

2019 and 2020 CHC Co-Chairs
o Introduce 2020 CHC Co-Chairs – Chris Gray and Aaron Pfannenstiel
o Hand off gift

2020 CHC Co-Chairs
o Present 2020 Riverside Conference Video

American Planning Association
California Chapter
Making Great Communities Happer

DATE: January 10, 2019 (updated January 27, 2019)

TO: APA California Chapter Board

FROM: Hanson Hom, AICP, Vice President Conferences

SUBJECT: 2018 CONFERENCE CLOSURE REPORT & DISTRIBUTION OF CONFERENCE PROFIT
_____

RECOMMENDATIONS

1. **Accept the 2018 Conference Closure Report and Profit and Loss Statement;**
2. **Upon final P & L reconciliation, distribute the 2018 conference profit to the Chapter and Sections in accordance with the Conference Requirements Handbook.**

DISCUSSION

Conference Closure Report

Pursuant to the Conference Requirements Handbook, the VP for Conferences and San Diego Conference Host Committee (CHC) prepare a Conference Closure Report following the conference. This report summarizes conference registration, sponsorships, income and expenses for the 2018 conference. For the benefit of future conference planning, the CHC has prepared an additional report with helpful attachments that details successes, challenges, recommendations, and unexpected items that occurred during the planning of the conference and at the conference itself (Attachment 1). The VP of Conferences also sent out a post-conference survey to all attendees and the results are summarized below. Both the CHC report and survey results have been provided to the Central Coast CHC to assist in planning the 2019 conference in Santa Barbara.

In addition to accepting the Closure Report, the Board should also approve the distribution of the conference profit pursuant to the Conference Requirements Handbook.

The 2018 APA California conference in San Diego offered over 100 sessions, 4 pre-conference workshops, Opening and Closing Keynotes, the annual Diversity Summit, and 13 mobile workshops totaling over 200 AICP CM credits, including multiple opportunities for Law and Ethics credits. The Opening Reception was held on the historic USS Midway which was reserved entirely for APA California on Sunday evening. Planners and guests enjoyed the top deck of the aircraft carrier with its panoramic view of the city skyline, while the lower deck offered more food and beverages, entertainment and guided tours. The Opening Keynote was a welcome address by Assembly Member Todd Gloria of the 78th State Assembly District and former Councilmember for

the City of San Diego. The topic for the Diversity Summit was "Moving Toward Transportation Justice." The annual APA Chapter Awards Ceremony and CPF Auction were also well-attended events at the conference. The conference ended with a Closing Keynote by Dr. Mary Walshok, Associate Vice Chancellor for Public Programs and Dean of Extension at the University of California San Diego.

Registration:

Total registration for the APA California 2018 conference was 1,665, which is the second highest attendance ever. This considerably exceeded pre-conference projections and doubled the attendance of the last conference held in San Diego in 2010. Approximately 88 percent of attendees registered for the full conference and the remaining 12% registered for one day. A particularly large number of students attended the 2018 conference compared to prior years. The breakdown of registration is as follows:

Registration Category	Number	Percent
Members/Non-Members	1009	60.6%
Chapter Only	123	7.4%
Registered Speakers	152	9.1%
Students	230	13.8%
Young Planners	151	9.1%
TOTAL	**1,665**	**100.0%**

Attendance at the San Diego conference compares to prior years as follows:
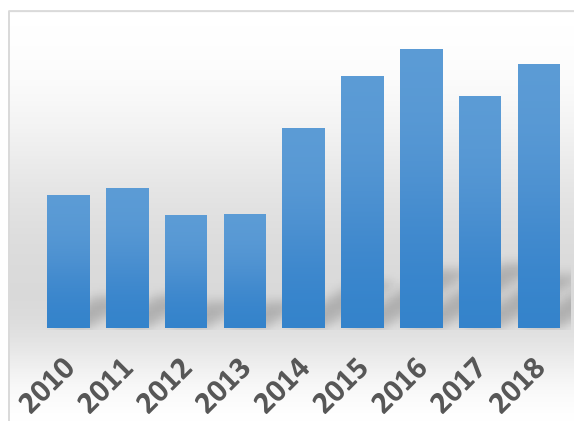
Conference	Total Registration
2018 San Diego	**1,665**
2017 Sacramento Valley	1,462
2016 Los Angeles	1,758
2015 Northern	1,590
2014 Orange	1,257
2013 Central	717
2012 Inland Empire	708
2011 Central Coast	879
2010 San Diego	838

Conference Profit:

The Conference Requirements Handbook requires that conferences achieve a minimum profit of $120,000 based on 900 registrants. The Handbook further sets a profit margin guideline of 20-25 percent (net income/gross income) for larger conferences. This guideline balances providing a high quality and complete conference experience for attendees while ensuring that conferences generate income to fund the ongoing programs of the Chapter and sections. The Host Section also heavily depends on its share of conference profits to fund its activities for multiple years.

The 2018 conference generated $885,378.58 in gross income with total expenses of $605,076.70. Net revenue was $280,301.88. After adjusting for seed money repayment and credits, the conference profit for distribution is $272,109.41. This represents a profit margin of 31 percent.

Income:

Sources of income are summarized below with line item details available in the attached Profit and Loss statement for the 2018 conference (Attachment 2):

Income Source	Amount	Percent
Registrations*	$ 746,533.00	84.3%
Sponsorships	$ 138,825.00	15.7%
Misc. Income/Credits**	$ 20.58	- %
TOTAL	**$ 885,378.58**	**100.0%**

* Includes mobile workshops and extra event tickets; excludes pre-conference sessions and CPF donations.

** Additional credit pending from hotel/convention center.

Sponsorships:

The CHC Sponsorship Subcommittee generated $138,825.00 in sponsorships for the conference. They were able to sell out 35 exhibitor booths early. The committee was effective and systematic in seeking sponsorships and conducted considerable outreach. The historic trend between conference profit and sponsorships is shown below.

APA CALIFORNIA CONFERENCE
PROFIT & SPONSORSHIP PATTERNS

YEAR	LOCATION/SECTION	PROFIT	SPONSORSHIPS
2018	**San Diego Marina/San Diego**	$ 272,109	$ 138,825
2017	Sacramento/Sacramento Valley	$ 205,425	$ 127,137
2016	Pasadena/Los Angeles	$ 343,488	$ 144,675
2015	Oakland/Northern	$ 135,931	$ 147,645
2014	Disneyland/Orange	$ 38,763	$ 114,100
2013	Visalia/Central	$ 136,737	$ 76,021
2012	Rancho Mirage/Inland Empire	$ 140,000	$ 120,650
2011	Santa Barbara/Central Coast	$ 131,000	$ 81,900
2010	La Costa/San Diego	$ 78,782	$ 56,390
2009	Squaw Creek/Sacramento Valley	$ 52,690	$ 82,750
2008	Hollywood/Los Angeles	$ 143,036	$ 173,300
2007	San Jose/Northern	$ 216,216	$ 158,450
TOTAL		$ 1,894,177	$ 1,421,843
12-Year Average		$ 157,848	$ 118,487

Expenses:

The attached FINAL Profit & Loss Statement details conference expenses. Major expenses can be categorized as follows:

Expense Category	Amount	Percent
Operations (including conference contractors)	$ 89,788.21	14.8%
Conference Facility/Audio Visual	$ 92,387.16	15.3%
Opening Reception (USS Midway)	$ 108,420.13	17.9%
Other Food and Beverage: includes Keynote lunch, Consultants Reception and CPF Auction	$ 250,053.98	41.4%
Publicity/Social Media/Mobile App	$ 52,648.52	8.7%
Other Expenses	$ 11,778.70	1.9%
TOTAL	**$ 605,076.70**	**100.0%**

ATTACHMENT: FINAL Profit & Loss Statement, January 18, 2019

Distribution of Conference Profit

The Conference Requirements Handbook (Article III.H) stipulates how conference profits are to be distributed to the Chapter, Host Section and the other seven sections. The first $120,000 is to be distributed 40% or $48,000 to the Chapter, 40% or $48,000 to the Host Section, and 20% or $24,000 split equally among the other seven sections. Any amount above $120,000 are split 50/50 between the Chapter and Host Section.

Distribution of the 2018 conference net profit in accordance to the Conference Requirements Handbook is as follows:

DISTRIBUTION of 2018 CONFERENCE PROFIT

APA California Chapter	$48,000 + $76,054.70 = **$124,054.70**
Host Section: San Diego	$48,000 + $76,054.70 = **$124,054.70**
Other 7 Sections	$24,000/7 = **$3,428.57 each section**

Post-Conference Survey

As part of our continuing effort to improve our conferences and meet the expectations of planners, a survey was sent out to attendees after the conference. Over 325 responses were received (20% response rate). Respondents consisted of the following:

- AICP Members – 54%
- Public Agency Planners – 61%
  Private Practice Planners – 26%
- Years of Practice:
  Up to 10 years – 23%
  10 to 20 years – 38%
  Over 20 years – 39%

Conference Sessions

Generally Satisfied 43.08%

Not Satisfied 5.54%

Very Satisfied 51.38%
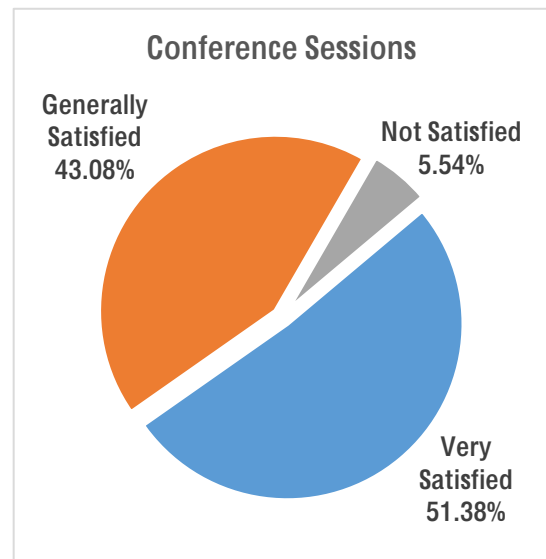
Many observations and suggestions were offered for future conference planning. Regarding the quality and breadth of conference sessions, 94% expressed satisfaction with the topics offered, and a similar percentage felt the sessions were applicable to their current job or practice. Particularly helpful were suggestions for future topics and feedback for improving sessions. Reoccurring suggestions encouraged expanding the diversity of topics, session formats and speakers.

Members were mostly very satisfied (54 percent) with the onsite registration support provided at the conference, but difficulties with registration were noted on Sunday morning when the online program went down temporarily. This was the first year that badges and tickets were mailed out in advance to pre-registered attendees instead of available for pick-up at the conference. The goal was to reduce registration lines and while generally successful, it did not go as smoothly as planned, so this will be a continuing item for process improvement.

The heavily attended Opening Reception at the USS Midway received rave reviews with many commenting on the spectacular setting for this premier conference event. The only dampening observation was regarding the initially long food and drink lines due to everyone arriving at once. But plenty of food was available throughout the night and the entertainment and networking setting received very positive feedback.

The San Diego CHC tried a new approach for the luncheon event. Instead of a plated lunch with a keynote speaker, the lunch was buffet style and was organized as an informal networking event with no keynote speaker. The response to this concept was overall positive, but some still preferred having a keynote speaker for AICP CM credits for at least a portion of the lunch or perhaps returning to holding the Awards Ceremony over lunch. The other "Lunch-On-Your-Own" day was well-received although some preferred a downtown setting with restaurants within convenient walking distance.

Luncheon Event

- No Preference 29.23%
- Prefer Keynote Speaker 30.46%
- Prefer Network Lunch 40.31%

Primary Conference Resource

- Both 27.38%
- Printed Program 32.62%
- Mobile App 38.77%
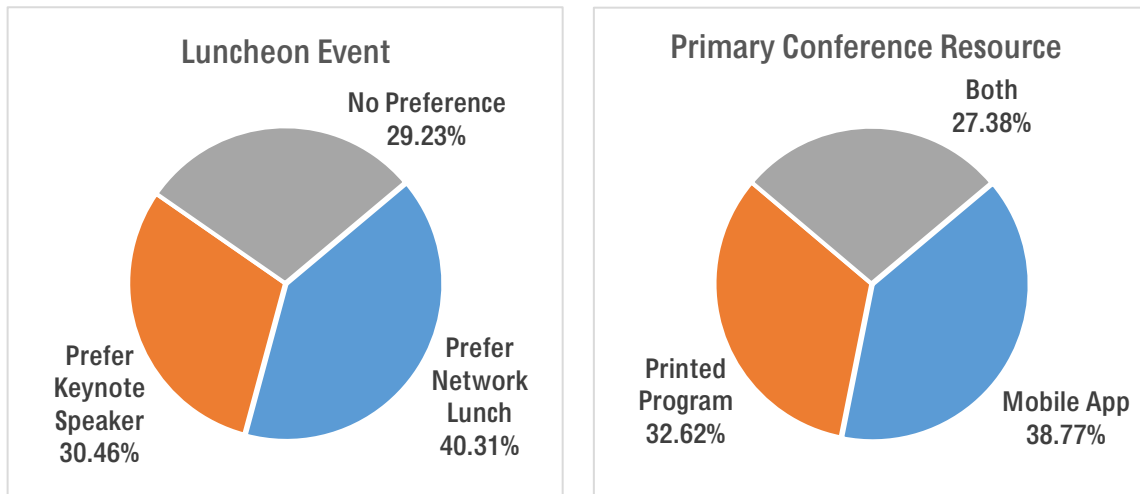
With the goal of implementing more sustainable practices for our conference such as eliminating the full printed program in 2019, we asked attendees if they relied more on the printed program or the mobile app for conference information. While an increasing number of attendees are using the mobile app, a large number of attendees still refer primarily to the printed program. This suggests that at least a summary guide of conference sessions and events would be helpful and appreciated by many attendees.

For the 2019 conference, we will look into enhancing the mobile app since we will not be providing a full printed program. We sought suggestions for improving the mobile app and also asked users which features they used. Below were the responses:

Q10 If you used the mobile app, check all the features that you used.

Answered: 325   Skipped: 7
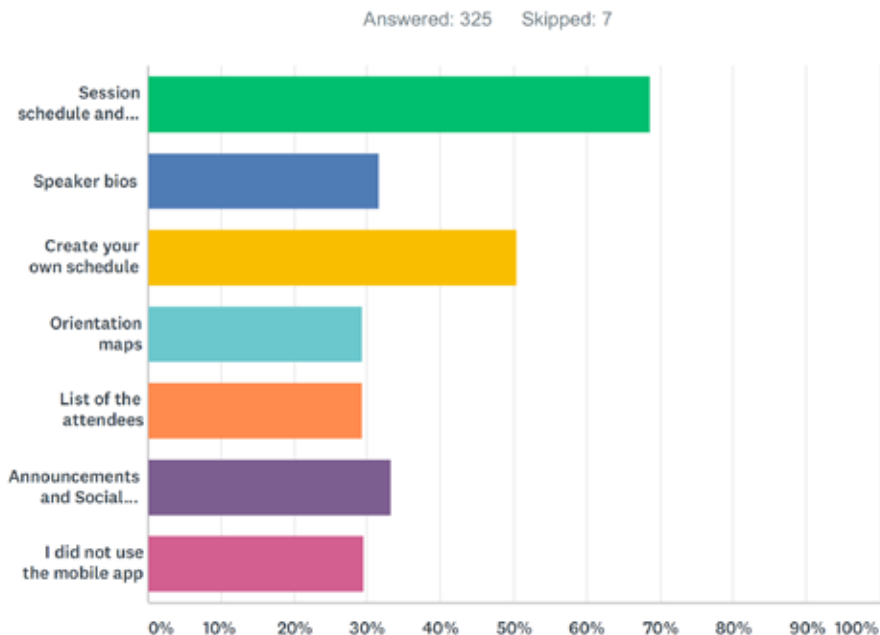
Attachments:
1. San Diego CHC Report with attachments
2. APA California 2018 Conference Profit & Loss Statement

Date: **January 3, 2020**

To: **Hanson Hom, AICP, Vice President for Conferences, APA California**

From: **Rachel Raynor, Bret McNulty, Jeff Wilson, and Tess Harris, Conference Host Co-Chairs**

Subject: **Report to the California Chapter from the 2019 Chapter Conference Host Committee Co-Chairs**

We are pleased to present this report and its attachments from the CHC to the Chapter and to the 2020 Conference Host Committee. We hope these observations and insights are helpful in the preparation of the upcoming 2020 Conference; we are available to answer any questions. Good luck 2020 CHC!

Please contact Tess Harris at tessmharris@gmail.com *or Rachel Raynor at* rcraynor@rrmdesign.com *if any questions or to assist in reaching Subcommittee Chairs.*

CHC Co-Chair Overall Comments

Rachel Raynor, Bret McNulty, Jeff Wilson, and Tess Harris

1. Best thing we did that was successful:

   ● Holding the opening reception at the historic Santa Barbara Courthouse and Sunken Gardens.
   ● We began meeting early and set a monthly meeting schedule. By doing that, we had secured the theme and conference venue more than a year prior to the event.
   ● Delegated teams early and focused our monthly meetings on reporting out from the leads of each subcommittee.
   ● Created a planner's guide to the City of Santa Barbara for conference attendees to find places to eat, stay, and things to do.
   ● Organized enough volunteers to assist with registration, resulting in limited lines for conference badges.
   ● Went paperless in an effort to be more sustainable, tried to reduce the number of giveaway items.
   ● Communicated with past sponsors and obtained contact information for sponsors during the 2018 conference, which we used when searching for sponsors.
   ● Held a couple of our conference host committee meetings at the hotel so that our subcommittee chairs were familiar with the space prior to the conference.
   ● Chose programs based on how good we thought they were rather than how they fit in a track. Overall, the programs committee had the most work and were able to juggle selecting programs and moving them around or making changes due to last minute requests.
   ● Our leads/co-chairs for each of the sub-committees really took their role seriously and delivered. Our conference was successful because of them.

2. Things that worked out well that we suggest the 2020 subcommittee continues or pursues

   ● Delegation of review/authority - each Co-Chair was designated at least two subcommittees to oversee and guide/provide direction or decision-making authority in between CHC meetings. This worked well so decisions were able to be made in between meetings and we were not at a standstill until the next meeting. The divvying up also allowed for reasonable amounts of time to devote to conference items for the Co-Chairs, providing for each Co-Chair to spend realistic time commitments on conference planning.
   ● Set a regular monthly day and week and hours for the Conference Host Committee and Co-Chairs meetings and stick to the schedule. You still have the flexibility to change the day if needed, but it helped our volunteers to calendar a schedule of regular meetings. The Committee Chairs would attend as their individual deadlines approached and that helped facilitate agenda management.
   ● Plan for more mobile workshops than you need in order to accommodate any that do not get filled or drop out due to planning, cost, etc.
   ● If the photographer had not been as expensive, it would of been nice to open the headshots up to potentially a two day perk, so to allow participants that were not there on Sunday for Student Day.
   ● Found an opportunity to have our networking lunch outside, so while still at the conference venue, it provided a different feel than a conference ballroom.
   ● The tech support used at the conference set up their own computers in each of the rooms for presenters to use. That way, everyone had to only bring a USB with the presentation on it rather than a computer and dealing with the logistics of setting up different computers between sessions.

- Adding an additional session on the last day of the conference helped encourage some people to stay for that day since there were sessions from 8-1pm. We also focused each session block on the last day to only have a couple options to choose from so that the rooms were more filled.

3. Things that were a challenge and what to do differently or how to change how we did it

- Volunteering - start early and get more than you need. Volunteers tend to drop off and things come up, so planning for more volunteers than you need is encouraged so you are not scrambling close to the conference looking for last minute volunteers.
- The opening reception was great, but organizing the multiple vendors the day of and things like getting cutlery and paper goods as a result of multiple vendors ended up being an unexpected task for our social committee.
- Tracks for programs sessions - our program's committee has mentioned that they wish that instead of thinking of the tracks that we chose in the beginning, they picked the best sessions and then organized them according to a "track". We would recommend not getting caught up in what track a session is when reviewing programs.

4. Something we didn't expect and it was the most challenging thing we had to deal with

- Received some feedback that conference participants did not like that the conference hotel used disposable cups.
- Tight space at the conference venue to move between sessions and through areas with sponsorship booths. We were aware that the space would be tight before the conference and there may not have been much we could have done, but perhaps moving sponsorship tables or the registration table to locations that weren't as congested may have helped.
- Not many food options at our opening receptions for vegetarians, vegans, or those with dietary constraints. Due to the nature of a "tasting" from multiple restaurant venues at the opening reception, it made it hard to accommodate all dietary restrictions.
- Tickets, lighting, and lines for drinks at opening reception - we had a lot of people show up!
- Since we used multiple vendors for the opening reception, we had to provide them with a set # of plates they would need to have prior to the event. It made it challenging to anticipate how many people would show up and sell extra tickets before the event, since we didn't want to run out of food or drinks.

5. Documents or guides that you prepared that you recommend the 2019 subcommittee uses – either attach it/them or offer to send them.
- The 2018 Communications Subcommittee shared a schedule for releasing different Conference-related posts. The schedule kept us accountable and allowed for a comprehensive master list so we could keep track of our material to ensure we were not duplicative.
- Planner Guide to Santa Barbara - we compiled a list of restaurants, things to do, landmarks, etc. in Santa Barbara.
- Programs PowerPoint

Overall Comment about Sponsorships:

Our Sponsorships team nailed it out of the park with their requests/sponsorship asks for the 2019 conference. It was a small but mighty team and they worked effectively. What was key was to be diligent and continue to follow-up with sponsors, up until the point they've paid and payment has been received.

Sponsorship solicitation went fairly smooth. We divided it among 3 people, but it did come down to 1 person generally being the lead in communicating with the Conference Co-Chairs, forwarding forms to Francine and coordinating with Laura, updating the tracker, etc. This person provided updates at our monthly meetings on status and who they had contacted or received sponsorships for.

The process didn't require much "hard selling". Generally the usual sponsors who participate annually were contacted and got involved without much "selling", mixed in with some local sponsors. We anticipated needing to backfill at the end with local sponsors, but that wasn't really the case.

Required coordination and follow-up with other committee members who were tasked with coordinating pens, beach mats, opening reception, etc.

Coordination with the State folks/vendors was very smooth and always timely - i.e. Francince Farrell, Dorina Blythe, Laura Dee, etc.

There was some initial confusion that had to be worked out with certain entities expecting comp tables, and certain sponsors who weren't paying attention when the solicitation went out and missed their opportunities. Very few isolated cases and did not cause major issues.

We had limited space in Santa Barbara so there were a limited number of sponsors and entities looking for a table that we could not accommodate. It would have been nice to have more tables than we could sell rather than having to turn some away; although this was very limited, and our team got creative in thinking about how those folks could still sponsor events at the conference.

We solicited for sponsorships for each mobile workshop and we got a few sponsorships that way, which was different from previous years.

Overall Comment on Ethics:

We held a couple ethics sessions throughout the conference and decided to try to include one of the main ethics sessions on Tuesday, rather than Wednesday so that more people could attend. This seemed to be successful, and we didn't hear much feedback about people feeling like they did not have an opportunity to attend an ethics session while at the conference.

Overall Comment on Last Day:

It is always hard to get good attendance during the last day. We tried adding an additional session on the last day to make it "worth it" for people to stay, which helped somewhat with attendance, although it was still limited. Our sessions on the last day went from 8:00 - 9:30am, 9:45 - 11:15am, and 11:45 - 12:30pm. We did receive some questions about whether we would be providing lunch since the day crept into the lunch hour, but I think most people were appreciative of an additional session, especially if they stayed the extra day. We provided a number of mobile workshops on this day as well.

Programs Subcommittee Report

Andrew Newkirk and Brian Smith, Co-Chairs

1. Best thing we did that was successful

   ● Got volunteers on board early in the process (as we began to prepare the Call for Proposals). This created buy in and we had no drop off in participation as we went along.
   ● In person meetings. We would have in person meetings monthly. Based on geography, this might not work for all Chapters. It helped create a fun and collaborative environments that helped sustain us.
   ● Once we received proposals, we didn't fixate on the tracks. More on this below.
   ● We had a good mix of committee members with respect to: public/private sector, levels of experience, personal backgrounds.
   ● We shared documents on Google so all committee members have the latest and greatest information.

2. Things that worked out well that we suggest the 2020 subcommittee continues or pursues

   ● Sort proposals by topics that you see as recurring in the submissions (not necessarily your call topics of the APA topics). There are too many APA topics to use and tracks may not adequately group similar sessions. We flagged about twelve topic areas that many, but not all, submissions fell into and we reviewed submissions by topic area. This helped make the review and selection process manageable.
   ● Continued reliance on the Conference Handbook, and continuous consultation with the Chapter's Conference Board Representative (Hanson Hom).
   ● Have each person score a lot of sessions in the online system. We had each person score about 80, so that each submittal was scored by three people. We were concerned that this might be really time consuming, but it was not. It also allowed each committee number to be familiar with a lot of submittals when we got to the final selection process.
   ● Use a table with the session blocks as columns and the time slots as rows. Fill in the sessions as you select them (and color code by topic as discussed above). We did this in PowerPoint with each slide a different day of the conference.

3. Things that were a challenge and what to do differently or how to change how we did it

   ● The session "Scoring Criteria" (used in the online scoring system) should be spelled out in the Call for Presentations. As with a Request for Proposal for professional services, those preparing a submittal for a proposed session should understand how their proposal will be evaluated by the Programs Subcommittee.
   ● The scoring criteria should also be revisited and revised. We didn't focus enough on this and we also didn't do enough to ensure that everyone scored the same way. As an illustration, the 2019 Subcommittee had differing opinions on how to score the "Innovative Format" criteria, and whether the "Diversity" criteria related to: socioeconomic issues; or public/private sector distinctions; or urban/rural areas. All legitimate distinctions, but once 200+ submissions have been received, it can be dysfunctional to establish consistency among 5-6 Subcommittee members evaluating their assigned sessions to review.
   ● If you do anything but have each scorer score all sessions in a track, you have to assign sessions manually to each person. This is really time consuming for the person assigning the work.

- The Conference Tracks developed for 2019 might have been helpful in prompting responses to the Call for Presentations, but most of the session submittals did not really fit the wording of these Tracks. When it came time to comparatively evaluate the 200+ proposed sessions for the Conference, we selected those sessions which we felt would be of the most interest and relevance to our attendees, irrespective of the "Tracks" we originally established. Past Conferences have experienced the same phenomenon:

  2019 Conference Tracks
  The Future is Now – Innovation and Emerging Issues
  Come Together – Encouraging Cooperation and Partnerships
  Nuts and Bolts – Preparing the Planning Office of the Future
  Riding the Wave – Adapting to New Realities

  2018 Conference Tracks
  Planning for Inclusion – One Size Fits All?
  Interfaces: Where Things Collide
  Solutions and Innovation
  Good Intentions, Unintended Consequences

  2017 Conference Tracks
  Lessons Learned: A Diverse Past
  We're All in This Together: Implementing Diversity
  Tips of the Trade: Diversifying the Tool Kit
  Engage: Planning for Diverse Places and Perspectives
  Embracing and Envisioning Change: A Diverse Future

- In retrospect, we spent too much time exploring and fleshing out the explanatory wording of those Tracks; perhaps we should have heeded the advice of the Conference Handbook: "Keep the session tracks simple. Remember that the sessions should cover all types of planning as well as be relevant to California's urban, suburban and rural areas."
- The Conference Handbook places too much emphasis on developing "Tracks", since year to year, they ultimately are not strictly followed anyway. We suggest that the Handbook be revised to characterize Tracks as "optional", and provide more emphasis on the "all types of planning/urban suburban and rural relevance" direction.

4. Something we didn't expect, and it was the most challenging thing we had to deal with.

- The inordinate amount of time spent in "encouraging" State Chapter representatives, to submit timely and complete information for the "Mandatory Sessions" described Page 27 of the Conference Handbook. If such information is not provided within a reasonable time (e.g., 14 days of the Submittal Deadline specified for all submitters in the Call for Presentations), the Programs Subcommittee should be empowered to forfeit scheduling those Mandatory Sessions, and the Subcommittee could then program regular sessions in their place.
- The state then would also mandate certain days/times after we set the program. It was also a bit of a late hit to deal with videotaped sessions.

- Dealing with emails after proposal selection. We ended up being go-betweens for moderators and other people working on the conference. It was fairly unneeded work that didn't really help anything.
- Managing changes to sessions. Even with the online system, after the cut-off date, moderators cannot updated information online. This doesn't really make sense. They would email us changes, we would pass it along. Someone else would manually have to make edits, which leads to mistakes.

5. Documents or guides that you prepared that you recommend the 2020 subcommittee uses – either attach it/them or offer to send them

- We used a PowerPoint to prepare the program. This was really helpful and a good visualization tool (we are happy to provide if requested).
- The documents you can create through the online system are really helpful. It would be wise to learn how to create these.

Mobile Workshops Subcommittee Report

Lilly Rudolph, Chair

1. Best thing we did that was successful

   ● Start early. Establish a strong committee to take ownership of their respective MWs.

2. Things that worked out well that we suggest the 2020 subcommittee continues or pursues

   ● Use shared Google Drive to keep track of status updates, contact information, and budgets.
   ● Establish lead contacts and back up contacts. Share cell phone numbers and redundancy plans.
   ● We carefully coordinated with the CA APA on logistics, delegated day-of roles, and looped them in on all details. The working relationship was wonderful.
   ● Set a schedule for deadlines for securing locations/stops, outreach to speakers, and site hosts.
   ● Allow committee members to own their MWs. They should come up with ideas and then take responsibility for seeing it through.
   ● We set up a conference call with the previous year's MW chair and gained valuable information.
   ● Assume that some MW ideas will go nowhere. Be ready to pull the plug on a couple logistically challenging ideas.

3. Things that were a challenge and what to do differently or how to change how we did it

   ● The bus company mixed up schedules and drivers. I recommend reviewing and re-reviewing the schedules with all vendors the day before.
   ● The State APA will expect deliverables (need for transportation, write ups, images/photographs for promotional materials, speaker names, contact information, bus routes) throughout the process and generally provides a lot of lead time, but it would have been helpful to have a complete list of deliverables and deadlines in advance to prepare.

4. Something we didn't expect, and it was the most challenging thing we had to deal with.

   ● Some committee members were non-responsive and required a bit of nagging. The Chair should expect to spend time following up with committee members.
   ● We established early that the MW committee would identify and plan all MWs. We didn't realize that MWs could be set up similar to programs (i.e., call for MW submissions, followed by selection). Determine which approach to use, but be prepared for unsolicited MW submissions if you opt for the committee-only approach.

5. Documents or guides that you prepared that you recommend the 2020 subcommittee uses – either attach it/them or offer to send them

   ● We can provide Google sheets and are also available for a call/meeting for additional insights.

Sponsorships

Steve Fort, Chair

1. Best thing we did that was successful

   ● Initiated early contact with prior year sponsors to start the discussion on upcoming opportunities and costs.
   ● Ongoing communications with CHC Chairs and other subcommittee chairs on status of sponsorships which assisted in awareness of expected revenues and anticipating further needs.
   ● Being diligent with tracking, following up un-paid sponsorships, coordinating with those in charge of giveaways and opening reception.

2. Things that worked out well that we suggest the 2019 subcommittee continues or pursues

   ● Obtained the list of sponsors from the previous year, notably big ticket sponsors, and opened discussion early.
   ● Monitored progress of sponsorships secured and identified any needs to be backfilled with local sponsors.
   ● Getting the sponsorship form completed and distributed early assisted in facilitating dialogues with sponsors.

3. Things that were a challenge and what to do differently or how to change how we did it

   ● Changing from bags to a beach mat was a great idea, however, it presented challenges on identifying a sponsor and a vendor to make the mat. Recommendation would be to finalize any unique sponsorship give away items early in the process and secure sponsorships and vendors early.
   ● Running out of tables due to limited space. Recommend identifying layout and location of sponsorship and comp tables early to assist in selling spaces and knowing what inventory is available this will help in ensuring that the regular attendees get their comp tables and what is available.
   ● Many of the large sponsorships waited until after the National Conference to commit fully and this required ongoing communication to ensure they were engaged and obtained a premium location.
   ● Limited space impacted the ability to offer different selections for premium and sub-prime sponsor locations. If space and the siting accommodates, recommend identifying prime and sub-prime locations early so that the large sponsors don't appear to be sited next to a sub-prime. In other words, they are getting something for the large sponsorship donation.

4. Something we didn't expect, and it was the most challenging thing we had to deal with.

   ● Ensuring the regular booths or attendees get their comp tables. This was challenging mostly due to lack of awareness at the start as to who got tables and how many tables were necessary.

5. Documents or guides that you prepared that you recommend the 2020 subcommittee uses – either attach it/them or offer to send them.

- They have been provided with our tracker that included contact info, sponsorship levels, dollar amounts, etc. They have been spoken to and informed they can feel free to contact. Provided them a verbal overview of our experience.

Student Programs Subcommittee Report
Rachel Raynor, Chair

1. Best thing we did that was successful:

   - We outreached for speakers early on which eased the identification of speakers
   - Contacted the session speakers well in advance to notify them of their session room and time slot, as well as what material was expected of them.

   - Photographer for professional headshots - got a lot of great feedback about not having to pay for a headshot. Worth the cost. Factor your student programs budget accordingly.

2. Things that worked out well that we suggest the 2020 subcommittee continues or pursues:

   - See above.

3. Things that were a challenge and what to do differently or how to change how we did it:

   - Finding a venue that allows under 21 was challenging. We felt it was important to not only allow one particular age group to the Student and Young Planner mixer.
   - If the photographer had not been as expensive, it would have been nice to open the headshots up to potentially a two day perk, so to allow participants that were not there on Sunday for Student Day.

4. Something we didn't expect, and it was the most challenging thing we had to deal with:

   - Though this was not challenging, unlike San Diego, Santa Barbara we did not do a resume clinic or career poster session. We felt that the Networking Luncheon, was more casual and let to less forced conversation

5. Documents or guides that you prepared that you recommend the 2020 subcommittee uses – either attach it/them or offer to send them:

   - None

Volunteer Subcommittee

Committee Chair – Selena Evilsizor

Primary volunteer responsibilities: Assist APA staff with check-in; distribute badges and bags to pre-registered attendees; direct people to the correct registration line; stuff bags; assist with CPF auction; load buses for tours and opening reception.

Special Events Subcommittee/Opening Reception

Hollee King, AICP, Events Chair

1. Best thing we did that was successful:

    ● The Venue for the Opening Reception was a beautiful backdrop for our opening reception
    ● Everyone had a great time and also loved looking inside the courthouse and clock tower
    ● Great representation of Santa Barbara and showcased the SB County Courthouse - a historical building.
    ● Top 5 star restaurants were at the event for Food and Wine event. Event had seven food options, dessert option, wine options, beer options, and non-alcoholic drinks.
    ● The event had 17 vendors total. The event required coordination of all of the vendors for about a year prior to the conference.
    ● Despite minor complaints by a few, most everyone had a wonderful time and were talking about it for the entire conference.

2. Things that worked out well that we suggest the 2019 subcommittee continues or pursues

    ● Having the venue off-site from the Conference Hotel is ideal for an opening reception. It showcases the location of the conference and it allows for the opening reception to truly be a safe space that people can meet and greet colleagues and have some fun too.

3. Things that were a challenge and what to do differently or how to change how we did it

    ● It was definitely a challenge to work with 10 different vendors for food, wine, and beer. Many times we could not get information from them.
    ● The costs per vendor were very different. Even though we had a price point of $7 out the door, some charged $5 out the door, while at least one was $9 out the door.
    ● Also, the different restaurant vendors required different things; Plates, forks, etc. as well as gas or electric. Coordinating all of this was a monumental task
    ● Other vendors were needed beside food, wine, and beer - Rentals, Ice, Lighting, Trash Service, Fencing, etc. Some vendors were anticipated, others such as ice was not.
    ● The event had 17 vendors total. The event required coordination of all of the vendors for about a year prior to the conference. Having a fewer amount - such as one caterer, a rental company, and a lighting vendor for an opening reception would be a lot easier and less coordination.
    ● Meals: Due to the fact that this was a limited tasting event (only 7 food vendor and 1 dessert vendor) the vendors could not accommodate everyone's palate, dietary restrictions, etc. In the future, vendors should be asked to include in their costs meals that can be altered according to dietary needs.

4. Something we didn't expect, and it was the most challenging thing we had to deal with.

- Tickets: The decision to attach tickets to registration. This required the attendee to register first at the hotel. Many people, including local planners, just arrived at the venue before checking in. This was a challenge we did not bring any extra tickets to the event.
- Tickets: The decision was made to print extra tickets for special VIPs etc. However, we had a "per plate" fixed amount from each vendor. We couldn't control the extra ticket count. In the future, extra tickets should be calculated from the beginning.
- Trash Service: We anticipated our trash vendor to clear plates, napkins etc so other people could sit and eat. The trash vendor only sent one person for over 900 people. He could not keep up with everyone.

5. Documents or guides that you prepared that you recommend the 2020 subcommittee uses – either attach it/them or offer to send them   N/A

Publicity Subcommittee

Clay Downing and Rachel Raynor, Subcommittee Co-chairs

1. Best thing that we did that was successful:
   - Developed a communications plan based on the one shared by the 2018 Communications Subcommittee, which acted as a schedule for releasing different Conference-related posts. The schedule kept us accountable and allowed for a comprehensive master list so we could keep track of our material to ensure we were not duplicative. The schedule is also organized to allow 3-4 posts a week; we'd encourage you to ramp up the posting efforts closer to the conference and make sure you highlight key deadlines for registration, sponsorships, session proposals, etc.
   - Ensure you have enough people on the subcommittee to staff and create the posts.
   - We had one person manage the posts on our end this year which we felt was easier to deal with.
   - Subcommittee developed themes that carried through multiple posts, which made it easier for subcommittee members to develop ideas for posts. Themes included people (speakers, "planner spotlights"), conference announcement (session themes, mobile workshops, deadlines), places (host city highlights), and in-conference posts.
   - Although obvious, every conference related email sent out by APACA staff is a prospective announcement for social media platforms. Subcommittee should plan for this and use the available material.
   - If the subcommittee does not already have access to a graphic design program, our team found Crello to be helpful and Canva was another option which was considered. Both offer free versions. Crello was used to create most of the sample materials below.

2. Things that worked out well that we suggest the 2020 subcommittee continues or pursues:
   - See above.

3. Things that were a challenge and what to do differently or how to change how we did it:
   - Though this was not a challenge, but the subcommittee wished they would have done more video posts to switch up the material medium. We'd encourage the 2020 publicity subcommittee to explore alternative forms of communicating a post to gain traction or get other active APA members to share on their accounts to reach different networks.
   - Instagram and Facebook were reasonably engaged social media channels, but there may be opportunities to improve reach on both Twitter and LinkedIn platforms.
   - Consider using more participatory posts on social media such as trivia, contest, or questions that result in a giveaway or recognition for the "winner" to create a more animated following of the conference materials.
   - The subcommittee sent press release materials to the state's other Section through email to the section's PIO's, editors, and social media managers. However, this was only done occasionally, and should likely be done with higher frequency.

4. Something we didn't expect and it was the most challenging thing we had to deal with:
   - Getting access switched over from the previous subcommittee - coordinate early on.

5. Documents prepared to share:

- Communications plan
- Example posts - opening reception, mobile workshops, and student activities

<u>Sample Posts</u>

apacaconf
Santa Barbara, California

M O B I L E   W O R K S H O P S

APA CA 2019 SANTA BARBARA

View Insights   Promote

Liked by **gpa_consulting** and **13 others**

apacaconf Adventures Await you in Santa Barbara! 2019's APA California conference in Santa Barbara offers numerous mobile workshops to show (via on foot, bicycle, or bus) you the ins and outs of city planning and urban design by highlighting key local projects and/or places on the Central Coast and how these spaces have been or will be benefitted by planning efforts. We encourage you to sign up for mobile workshops. CM credits may also be available for some of the mobile workshops so stay tuned! And don't you worry, we'll bring the helmets and bikes, be sure to bring your walking shoes! Stay tuned for the full list of mobile workshops. For more information on the 2019 APA conference, visit www.apacaliforniaconference.org

#apaca2019 #plannerswhobike #adventureawaits #tourism #mobileworkshops

View 1 comment

April 29

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apacaconf
Santa Barbara, California

HOP ON BOARD THE SANTA BARBARA CONDOR!

JOIN US FOR A MOBILE WORKSHOP BOAT TOUR OF OIL INDUSTRY LANDMARKS ALONG THE COASTLINE.

View Insights   Promote

Liked by **bascolover** and **6 others**

apacaconf Have you signed up for a mobile workshop yet? Check out our "Gaviota and Around Platform Holly by Boat." Docents will lead a boat tour focused on onshore and offshore oil facilities including the separation facility near the Bacara Resort, Bird Island, one of the nearshore abandoned platforms, and the Gaviota Pier. You'll head into the Channel where you'll learn about the world's largest naturally occurring oil seeps, the decommissioning of Platform Holly and what the future holds as pipeline reconstruction from the 2015 Refugio oil spill has been under a severe community and regulatory microscope. You may even see some whales and other marine life along the way!

https://apacalifornia-conference.org/program_table _of_contents.php

#APACAconference #APACA2019 #MobileWorkshops

June 14

apacaconf

Join us!
at
Diversity Summit
Sept. 15th
at
4:30pm

View Insights   Promote

Liked by **inlandempireapa** and **6 others**

apacaconf You won't want to miss the Diversity Summit on Sunday, Sept. 15th at 4:30pm! This year's theme is "Representation Matters", focusing on diversity & equity in the planning profession. Panelists include leading planners from throughout California from private, public, and non-profit organizations.

And don't forget to join us for the Diversity Mixer, Tuesday, September 17 @ 6:30 pm at Dargan's Pub, Downtown Santa Barbara for drinks and conversation/networking with colleagues.

#APACA19 #APACAconf

September 6

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apacaconf
Santa Barbara, California

See You in Beautiful Santa Barbara

A RESILIENT FUTURE 2019
APA CALIFORNIA CONFERENCE
SANTA BARBARA
SEPTEMBER 15-18

RENCE ISSUE

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VP-Public Information

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2019 Conference Issue of
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back to Santa Barbara,
Riviera. Situated between the

CALIFORNIA CAL PLANNER
Planning News & Updates from APA California

Cabrillo Blvd., Santa Barbara. Source: David Co

FEATURE | Nichole Garner
Evolution of Santa Barbara's
State Street Corridor

View Insights   Promote

Liked by **inlandempireapa** and **11 others**

apacaconf Continuing to gear up for the annual conference in beautiful and historic Santa Barbara, one of America's "Great Places", on September 15-18, 2019!

This month's issue of CalPlanner features the conference and it's theme of "A Resilient Future". CalPlanner is available and can be viewed both as a digital flipbook or as a PDF, which can be printed if needed. It can be found online at https://www.apacalifornia.org/news-and-media/cal-planner-newsletter/

#apaca2019 #APACAconf #resilient #planners

July 17

Post 1

apacaconf
Santa Barbara, California

DON'T MISS YOUR CHANCE TO TAKE ADVANTAGE OF REDUCED RATES

EARLY BIRD REGISTRATION RATES END JULY 3

View Insights   Promote

Liked by **amvplanner** and **3 others**

apacaconf UPDATED Reduced rates for early registration at the #APACA Conference have been extended to JULY 3, 2019 and a variety of rates are available depending on the type of attendee or portion of the conference that is selected.
Don't miss out! Register at https://apacalifornia-conference.org/registration.php

#APACA2019 #APACAconference #ReducedRates

View 1 comment

June 2

Post 2

apacaconf
Santa Barbara, California

See You in Beautiful Santa Barbara

A RESILIENT FUTURE 2019
APA CALIFORNIA CONFERENCE
SANTA BARBARA
SEPTEMBER 15-18

RENCE ISSUE

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APA CA
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California Chapter
Making Great Communities Happen

CAL PLANNER IFORNIA
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Cabrillo Blvd., Santa Barbara. Source: David Co

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#apaca2019 #APACAconf #resilient #planners

July 17

A RESILIENT FUTURE 2019

apacaconf
Santa Barbara, California

View Insights   Promote

Liked by **sagecrest_planning** and **14 others**

apacaconf The Funk Zone. A neighborhood in Santa Barbara that mashes together art, wine, cuisine, and artisans in an area known for creativity and a gritty vibe. #Planners need to check out this SB gem when they come to the 2019 #APACA conference. #apacaconference #santabarbara #centralcoast #revitalized

April 6

apacaconf
Santa Barbara, California

View Insights   Promote

Liked by **inlandempireapa** and **16 others**

apacaconf Thank you to our #APACA2019 conference co-chairs Bret McNulty, Tess Harris, Jeff Wilson, and Rachel Raynor! (Note: Rachel not pictured but she put in lots of work too!)

View 1 comment

September 18

apacaconf Today is the last day for reduced rates on early conference registration, don't miss out!... more

July 3

apacaconf
Santa Barbara, California

OPENING SPEAKER **Senator Scott Wiener**

Representing San Francisco & northern San Mateo County in the State Senate.

Focuses on housing, transportation, civil rights, criminal justice reform, clean energy and alleviating poverty

MONDAY 16TH @ 8:00am

View Insights   Promote

Liked by **apa_losangeles** and **11 others**

apacaconf Join us in welcoming Senator Scott Weiner as this year's opening speaker!

Senator Scott Weiner was elected in 2016 to represent San Francisco and northern San Mateo County in the California State Senate. Senator Weiner chairs the Senate Housing Committee, focusing on housing, transportation, civil rights, criminal justice reform, clean energy and alleviating poverty. Before being elected to the Senate, Senator Wiener served as a member of the San Francisco Board of Supervisors, chaired the San Francisco County Transportation Authority and served in many community leadership roles. He'll be speaking on Monday, September 16th at 8:00am.
Follow the link below for more information and how to register for this year's conference!

https://apacalifornia-conference.org/opening

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apacaconf
Santa Barbara, California

PLANNER SPOTLIGHT

Bret McNulty   McNulty Consulting
Conference Co-Chair,
Conference Host Committee

"What better location for the conference this year on the 50th anniversary of the Santa Barbara Oil Spill of 1969 as we continue efforts to sustainably plan for our communities and the environment. Have we succeeded yet?"

What are you most excited about for the APA California Conference in SB?

The APA California conference affords generations of land use planners an opportunity come together to share best practices and develop ideas that help our elected leaders better understand and define the agenda of a more "resilient future."

What is your favorite part of being a planner in Santa Barbara? Seeing the diversity of people, culture, and communities and life on the planet we share.

View Insights   Promote

7 likes

apacaconf This week's Planner Spotlight is Bret McNulty. Bret is a Co-Chair for the 2019 APA California Conference in Santa Barbara. According to Bret, a planner in Santa Barbara, "On the 50th anniversary of the Santa Barbara Oil Spill of 1969, what location could be better as we continue efforts to sustainably plan for our communities and the environment?" #APACA #APACAconference #planners

May 9

2019 Production Schedule

2019 APA Conference (September 15 - 18) A Resilient Future

Platforms: Email (by State Chapter), Facebook, LinkedIn, Instagram, Twitter and LinkedIn

Number of Weeks Prior to Conference	Week Of	Post #1	Post #2	Post #3	Post #4
@ CONFERENCE		Day 1, Opening Reception, "no heels, bring a layer"			
PRODUCTION SCHEDULE	9/15/2019	2019 Conference! (September 15 - 18)			
1	9/8/2019	Cal Poly Mixers (RR)	Rideshare Promo (use website info) (NG)	Planners Guide and "Excited to See you" (RR)	CPF Auction Tease
2	9/1/2019	"Expert Eats in Santa Barbara" Guide (RR)	Mobile Workshops with Space (CD)	Long-Term Sponsor Recognition (8yr Sponsors) (CD)	Diversity Summit (NG)
3	8/25/2019	APA Band/Plan It Rock (RR)	Pre-Conference Space Still Available (NG)	Long Term Sponsor Recognition (5-Year Sponsors) (CD)	CPF Donation Promo (RR)
4	8/18/2019	Mobile Workshops Promo (CD)	Regular Registration Ending (CD)	call for volunteers (RR)	
PRODUCTION SCHEDULE	8/16/2019	End Regular Registration			
5	8/11/2019	Reminder about end of Regular Registration (CD)	CPF Donation Promo	Mobile App Use Promo (CD)	call for volunteers (RR)
6	8/4/2019				
PRODUCTION SCHEDULE	7/31/2019	State Posts Session Descriptions			
7	7/28/2019	Commission and Board Agenda Promo (CD)	Video Clip - CHC (RR)	link to session descriptions - final 7/31/19 (CD)	
8	7/21/2019	Planner Spotlight - Hollee King (CD)	Site Photo - Teaser (RR)	Student Day Flyer (RR)	Sustainability Promo 2 (NG)
9	7/14/2019	Pre-Conference Session Promo (NG)	CalPlanner Promo (CD)	Session Promo (CD)	Sustainability Promo 1 (CD)
10	7/7/2019	Topic: Cool Projects (RR)	Closing Keynote Promo (NG)	Website Update Promo	Sustainability Promo 1 (CD)
PRODUCTION SCHEDULE	7/3/2019	End Early Bird Registration			
11	6/30/2019	Opening Keynote Promo (NG)	Early Registration Deadline Reminder		

12	6/23/2019	Opening Reception Promo (RR)	Planner Spotlight: Nick Johnston (RR)	Beach mat (RR)	
13	6/16/2019	P20 Conference Track Teaser: Wave of Change (CD)	Historic Destination on your own?		
14	6/9/2019	P18 2nd Mobile Workshop Highlights (NG)	P19 Sneak Peak		
15	6/2/2019	P17 Planner Spotlight, Andy Newkirk (CD)			
16	5/26/2019	P15 Awards Spotlight: State Award Highlight (CD)	P16 Early Bird Deadline Extended to 7/3	Student Promo Post (RR)	
17	5/19/2019	Conference Track Teaser: Come Together (CD)	P13 Planner Spotlight - Lilly Rudolph (Mobile Workshop Commitee) (CD)		
18	5/12/0219	P12: Registration Open Announcement (CD, to Section and Social)			
19	5/5/2019	P10 Mobile Workshop Promo: Channel Islands Overnight Boat Tour	P11 Planner Spotlight: Bret McNulty		
PRODUCTION SCHEDULE	May 1	Online Registration Opens and New Website			
PRODUCTION SCHEDULE	April 1 - 30	State to release Mobile Workshops Announcement State to release Opening Reception Announcement Hotel Information Posted Conference At A Glance Posted Conference website goes live April 30th			
20	4/28/2019	P2 Mobile Workshops Teaser (RR)	Planner Spotlight: Jeff Wilson (Conference Co-Chair) (CD)		
21	4/21/2019	P8: Hot Topic: @NPC19 (RR)	P9: Session Spotlight/teaser (NG)		
22	4/14/2019	P7: Conference Track Teaser: The Future Is Now (CD)			
23	4/7/2019	Sponsorships Promo (RR)	P6 Planner Spotlight - Steve Fort (Sponsorship Committee) (CD)		
24	3/31/2019	P1 Planner Spotlight - Lisa Plowman (RR)	P5 Funk Zone Promo (CD)		

25	3/24/2019	P3 Places - State Street (NG)			
26	3/17/2019				
27	3/10/2019				
28	3/3/2019				
29	2/24/2019				
30	2/17/2019				
31	2/10/2019				
32	2/3/2019				
PRODUCTION SCHEDULE	1/31/2019	Deadline for Session Proposals			
33	1/27/2019	Call for Proposals Deadline Reminder			
34	1/20/2019				
35	1/13/2019				
36	1/6/2019	Call for Proposals Reminder			
37	12/30/2018				
38	12/23/2018				
39	12/16/2018	Call for Sponsors Reminder	Call for Proposals Reminder		
39	12/9/2018				
40	12/2/2018	Call for Proposals (All Platforms)			

Date:	**December 13, 2018**
To:	**Hanson Hom, AICP, Vice President for Conferences, APA California**
From:	**Carey Fernandes AICP, Brooke Peterson AICP, and Betsy McCullough FAICP, Conference Host Co-Chairs**
Subject:	**Report to the California Chapter from the 2018 Chapter Conference Host Committee Co-Chairs**

We are pleased to present this report and its attachments from the CHC to the Chapter and to the 2019 Conference Host Committee. We hope these observations are helpful, and we are available to answer any questions.

Good luck 2019 CHC!

Please contact Betsy McCullough at betsy92106@gmail.com if any questions or to assist in reaching Subcommittee Chairs.

CHC Co-Chair Overall Comments

Carey Fernandes, Brooke Peterson, Betsy McCullough

1. Best thing we did that was successful

   - Location of the Opening Reception: The USS Midway knocked it out of the park for space, timing, shuttles, and entertainment. Rave reviews. Timing of shuttles was well-thought-out and worked well
   - Exhibitor space was spacious and well located; there was room for the Consultants' Reception in and among the sponsors.
   - Programs were really well received: credit to the Programs Subcommittee. They worked really hard to align sessions with the theme.
   - We had a well-chosen Opening Keynote Speaker. Assembly Member Todd Gloria set the perfect tone for the conference.
   - On the last half-day, we did not try to direct remaining attendees into 8-10 sessions. Instead, we selected 3 very popular topics, plus an Ethics session, so there were only 4. It didn't increase or decrease the number of attendees remaining, but it kept rooms full so the last-day speakers didn't dread presenting their session that day. Suggest thinking of creative formats for last day sessions.

2. Things that worked out well that we suggest the 2019 subcommittee continues or pursues

   - Lunch on your own one day/and a more casual lunch another day: this has been used since 2016 in Pasadena and the 1 free lunch period has not caused complaints either about programming the time or providing the food. The casual lunch was a buffet and there was plenty of opportunity for conversations at the well-sized tables plus the well-utilized outdoor eating areas.
   - Provide some breakfast for each of the conference days after the ½ day start day. Provide alternative to a continental breakfast: a heavy breakfasts each day can be breakfast burritos: they are a healthy alternative along with fruit and were a huge hit – those have been done several years now in response to complaints about sugar-filled pastries. Deene is aware of the goals to provide healthy and not-expensive.
   - We succeeded in drawing people outdoors as much as possible – for yoga and for eating.
   - Water filling stations are a must.
   - The first attempt at an online mobile planners guide: we got great reviews of it.
   - Promoting use of mobile app and keep reminding them that you are going all electronic. I think the post-conference survey missed an opportunity to inquire about which social media platforms attendees viewed prior to the conference because that question was not included. You may want to do a follow-up on use of electronic media to the 2018 attendees because while I feel we made significantly increased outreach this year, there's room for improvement and change for sure.
   - Minimize the number of full day mobile workshops; for morning and afternoon MWs schedule them so that attendees can take advantage of onsite lunch opportunities if other attendees are being provided lunch, or being given the opportunity to purchase lunch.
   - Assign each subcommittee to work most closely with a CHC Co-Chair and CHC Co-Chairs will coordinate as necessary.
   - Come up with creative sponsorships. We started too late, but a key card sponsorship seems like a natural for the conference hotel.
   - One of our Subcommittees set up an email address that both subcommittee co-chairs could use to respond to inquiries and communicate with the CHC Co-Chairs. We recommend that each subcommittee set up a similar email.

3. Things that were a challenge and what to do differently or how to change how we did it

- APA National registration – hiccups that bled into comments onsite:
  People did not receive registration in the mail
  People forgot at home
  Printer onsite for reprinting incorrect or forgotten badges was not working.
- Registration set up was late so work with Deene to assure timely setup.
- Provide clearer signage for which line to get in at Registration.
- CPF Auction this year was a high investment with low return. It is time to ask CPF to rethink it. The expense to the conference for food/beverage & a/v was approximately $30,000 and the income for scholarships was about $20,000. CPF operates the Auction separately from the CHC generally: ask for accountability.
- Awards Program had some challenges – acknowledgements, A/V, timing.
- Mobile workshops attendees need ongoing communication if there is information attendees need other than show up to board the bus at a certain time. Be sure to give clear information about whether lunch is included or they eat onsite. We used emails to registered attendees but despite specific information in the emails and on the mobile app, there were many questions. For events with specific logistics, there is no such thing as reminding someone too many times via social media or emails or mobile app.
- Mobile workshop attendees should be escorted from the minute the event starts to the end, and begin and end at the conference site. Make sure that there is someone on the bus departing the conference site and on the bus to return them to the conference site. ALSO, work with the Registration staff to contact via phone –i.e., actually speak to - each and every mobile workshop leader the day before their MW to make sure they or someone will be on the bus, confirm drop off location, or discuss other details specific to that MW. Coordinate between Registration staff and Mobile Workshop Subcommittee Co-Chairs to determine who will make those contacts.
- Insist that mobile workshop descriptions and speakers and times/dates/costs be completed at the same time as the regular sessions descriptions and session block assignments are completed – MWs are part of what needs to be programmed into the registration form and must be final. This is a big effort and may feel that it is early to have it tied down, but changes to schedule later caused rippled problems.
- Be sure to understand the needs/desires of the Volunteer Coordinator. Some are willing to stay and manage volunteers for the whole conference, but if they want to attend sessions, make sure there's an agreement among the coordinators of volunteers who will show up.

4. Something we didn't expect and it was the most challenging thing we had to deal with

- Registration: Details here and in the report from the Volunteer Coordinator.
- An item that was surprising distressful to attendees was them not receiving all the ribbons they wanted to hang from their badges to display memberships or achievements. We understood that ribbons were to be mailed to pre-registered attendees, but it did not seem to be consistent; plus, a number of attendees forgot their packets so were looking for not only new badges but for ribbons onsite. Suggestion is to NOT send out ribbons and let everyone pick them up when they arrive. They can be in the registration area away from the lines of those trying to register or with registration issues.

5. Documents or guides that you prepared that you recommend the 2019 subcommittee uses – either attach it/them or offer to send them.

We are attaching a script prepared that includes each of the plenary sessions and who speaks and for how long [Attachment 1] along with helpful logistical info for a number of people overseeing each event. Each event was started on a separate page so they could be provided to whoever was in charge of that event. Also a list of social media posts is the Appendix to this document.

Overall Comment about Sponsorships:

Revamp how sponsors are solicited annually: it is a pressure-filled responsibility of any CHC to achieve the goal sponsorship level that will then be shared with other Sections and the Chapter as the largest 'fundraiser' of the year. Look longer term and more broadly to create a partnership program between APA California and our regular sponsors. Come up with new opportunities to promote our sponsor partners, e.g., a directory of sponsors or a periodic feature article on one sponsor and their work and evolution as a firm and their contribution to APA California; brainstorm opportunities. As time goes on, we need to 'step up our game' to engage firms and organizations who we have worked with over time – they are evolving their relationships and their use of their promotional funds and we need to look into the future so we can continue to partner with them.

Overall Comment on Ethics the Last Half Day:

We promised the Ethics Survivor Island panelists that we would strongly urge, request, and beg the Programs Subcommittee to NOT assign them to the last day again this year. They have been on the last day many years in a row so as to create an Ethics draw that day. We suggest finding a creative format for an Ethics CM presentation – could it be pre-recorded or a film with comment at the end or ?? In any case, please do not place Ethics Survivor Island on the last day of the conference.

Programs Subcommittee Report

Anna McPherson and Mark Teague Co-Chairs

1. Best thing we did that was successful

   - There were two things that were helpful with the selection of programs for each conference Session Block. (Session Block represents the time slot on each day of the conference). The first was to create a spreadsheet with all of the information. The data in the spreadsheet was a direct download from the online system and had all of the data. Separate sheets within larger spreadsheet were used to parse the data into useful tables that could be reviewed by everyone. Having all the data in one place enabled us to sort, assign, and do many things on the fly.
   - The second thing we did was to use Betsy's index card system to assign the sessions to each session to a Session Block: a tried and true system. This system has an index card for each session that also notes the topic, speaker(s), focus area, etc. We used a separate color for each of the focus areas of the conference. We were able to glance at each Session Block to see if things were balanced, and able to move things around as needed. Yes, using index cards is analog, but it enabled the entire committee to discuss each session, balance the sessions in each Session Block, and generally keep order. Of course, we took the results of the index card assignment and put them in the spreadsheet, but the process was simple and effective. It was also fun.
   - Our committee worked very well together – the right mix of expertise, public/private sector, experience is essential to successful session planning. Make sure the members "fit" together.

2. Things that worked out well that we suggest the 2019 subcommittee continues or pursues

   - Having two co-chairs was effective and helped keep the burden from a single individual. In this instance we had both public and private sector represented, which provided different perspectives. This also accounted for differing work schedules, holidays, vacations, etc., ensuring that there was always someone available to assist. As the due date for submissions got closer the volume increased substantially and on the final day, it was an avalanche. The work is too much for one person. As far as final session selection, do not be afraid to contact session moderators to request changes to speakers, inclusion of additional information, even session name changes.

3. Things that were a challenge and what to do differently or how to change how we did it

   - It takes careful consideration if you receive a session that is clearly submitted by a vendor for promotional purposes, e.g., Power Point Training, Public Presentation Training. The subject matter may be valuable but may be contained in a less company-specific session.
   - Also watch out when there is only a moderator submitted with the session originally. If the abstract implies there will be a panel, you may sometimes have to doggedly pursue the additional speakers. Also, a 90-minute session with one speaker only is typically not worthy of a slot in our program.
   - There appears to be a 'disconnect' between the online system and the information that shows up in the programs. Each moderator is responsible for managing their speaker assignments and session titles, yet the online system shuts down at a certain point, requiring all subsequent changes to be made via email to first the program chairs and ultimately the person in charge of the program. We found that this was both cumbersome and resulted in chasing errors up to the final 'print' of the program. We recommend that you anticipate the need for changes and make assignments accordingly. Perhaps ask moderators to put PROGRAM CHANGE in the subject line of their email and create an Outlook rule to automatically

forward a copy of the email to the program manager, or assign someone to be in charge. The back and forth, and regular emails from moderators updating speakers, occurred throughout the process.

- One thing to note is that the three-digit number assigned to each session is not used by anyone after that assignment. Everyone seems to go by session title rather than this unique number. This is fine, except that that the title is long, and prone to changing between submittal and program. Certainly, the number doesn't need to go onto the program, but for internal purposes we found this odd.

4. Something we didn't expect, and it was the most challenging thing we had to deal with.

- Last minute schedule change requests and cancellations. The spreadsheet did a great job of ensuring we didn't schedule the same speaker during each track, however we received a number of requests to move sessions around after the first program was drafted. We were able to accommodate them, but it required a great deal of diplomacy and tact asking one session to move so another speaker could be accommodated. We assumed that each request was legitimate, and worked to accommodate, but it was an unforeseen annoyance throughout the end of the process. As you're reviewing each session, it would be useful to take note of moderators who you may know, and see if they are flexible in their time of presentation.
- Last minute cancellations. We had several last-minute cancellations, one of which resulted in a ballroom being empty for one of the tracks. It would be prudent to have a handful of sessions that could 'go' at a moment's notice, presumably local, etc., to avoid having an empty room. Be sure that this group of sessions is varied as you don't know what session might be cancelled. We had at least one session that could have filled the slot, but it was for a topic that we felt was already very well represented.
- Speaker changes happen, and in general we were able to make the changes until the final print of the document. However, this was the most often requested change, and after the online system is closed, the committee must make the changes. As noted above, we'd recommend having a system to deal with these and discuss it beforehand.
- The matrix used to cumulatively track changes created by the Conference Program Coordinator was very helpful. We would like to have been able to see confirmation of the changes we sent in being included. Use a single format for sending in changes – don't just forward emails from moderators to avoid missed changes.
- Also, although this may be inevitable, we were both surprised at the comments we received from disappointed moderators of sessions we declined to accept. Some moderators were quite dogged and were reluctant to accept the rejection. That was quite time consuming.

5. Documents or guides that you prepared that you recommend the 2019 subcommittee uses – either attach it/them or offer to send them

Attached is the spreadsheet we used to help with the program selection. You'll see that it's very primitive, and is intended to be easy for anyone to view. We made liberal use of Excel's data sort functions and formatting to make the data available to the committee. Whether by design, or happenstance, only one person was in charge of the spreadsheet. This reduced the potential for errors. [Attachment 2] We can also forward earlier working versions of selection documents that greatly assisted us in rating and ranking sessions as well as sorting into topics and tracks to assure a balanced program. Contact Mark Teague.

Mobile Workshops Subcommittee Report

Brian Grover and Phil Trom Co-Chairs

1. Best thing that we did that was successful

   - I think we did a good job with the diversity of mobile workshop types, providing something for everyone. I also think they were very well-organized and had amazing speakers (several mobile workshops were shining stars in this category – Tijuana walking tour). We also sold out just about every mobile workshop.
   - As a subcommittee, early on we decided that a smaller number of workshops was preferable to a larger list, and we focused on doing a good job with the ones we had. We also identified leads for each workshop so that the subcommittee did not need to lead all of them.

2. Things that worked out well that we suggest the 2019 subcommittee continues or pursues

   - Stick with the smaller number of workshops (10-13). Line up the workshops early in order to encourage a broad spectrum of workshop types (transportation, environmental, land use, etc.). Stay on top of each mobile workshop lead so that none of them fall by the wayside through the planning process. Definitely incorporate as much multi-modal transportation as possible into the mobile workshops. Partner with a bikeshare company if possible – we had a lot of success with that for biking mobile workshops, and more generally for overall conference mobility.

3. Things that were a challenge and what to do differently or how to change how we did it

   - Make sure that all of your mobile workshop leaders know exactly when and where to meet their mobile workshop attendees. Work out logistics early on so that they don't become issues at the last minute. Be prepared to improvise and "make things work" if a leader or speaker bails at the last minute, for example.

4. Something we didn't expect and it was the most challenging thing we had to deal with

   - Inevitably, some things won't go as planned. The most challenging thing we had to deal with was making sure that everyone involved (host committee, mobile workshop attendees, mobile workshop leaders) kept their cool and rolled with the changes.

5. Documents or guides that you prepared that you recommend the 2019 subcommittee uses – either attach it/them or offer to send them

   Some of the individual workshop guides were really helpful [Attachment 3a, 3b]. I am also happy to share our budgeting spreadsheet and other logistical information. I'm happy to serve as a resource for the next host committee in Santa Barbara – please tell them to reach out to me any time. bgrover@dudek.com, or 760-479-4248.

Sponsorships

Comments from Betsy McCullough, CHC Co-Chair, and Laura Black, Subcommittee Chair

- The entirety of the sponsorship work was done by one subcommittee chair with general assistance and guidance from the CHC Co-Chairs.
- Letters were sent to all past sponsors urging them to sponsor in 2018; a number of regular sponsors contacted us first.
- Do not promise particular booth space or other location until you have the approved Exhibitor Space/Floor Plan provided by the Conference Manager as approved by Fire Marshal.
- The chapter has been tracking sponsors for almost 10 years now. There were enough sponsors who had sponsored more than 5 years [not necessarily consecutive] that we created an '8+ year' level of sponsorship acknowledgement. Many have been sponsoring way longer than even 8 years, but we didn't have it recorded or companies have been merged or dissolved so what we have is the 'modern' record. We suggest you look at a 10+ year category.
- The Sponsorship Subcommittee Co-Chair should review all final documents to assure that proper recognition is given to sponsors for booths or events or other items: there are subtleties that may not be picked up by those doing general proofreading or general editing. In particular: the online program, the event signs, the 6' sign boards in the hallways, and the PowerPoint used before plenaries.
- Pursue potential sponsors even beyond any stated deadline.
- Check with CHC Co-Chairs about creative proposals for sponsorships.
- Once the completed sponsorship is submitted and an invoice is provided, the sponsor has 10 working days to pay the invoice. If payment is not received by this timeframe, booth exhibit space is no longer guaranteed. **Background for this seemingly-harsh statement:** Background: we had a sponsor request a non-public agency booth in June 2018. Booth location was provided/confirmed. Payment was never received. Staff found out AFTER THE CONFERENCE, that this sponsor did not attend the conference. Since exhibit space is so crucial, this was missed opportunity for another firm to utilize that booth space. We were able to negotiate with the sponsor payment of $500 (original price was $1,000)
- Send a thank you email to all sponsors after the conference with the contact information for the next sponsorship chair to "pass the baton" to the next host Section.

Sustainability Subcommittee Report

Kelly Bray, Renee Yarmy, Tara Lieberman, Asha Bleier

1. Best thing we did that was successful

    - The Planners Guide Map and Outreach Materials. The Planners Guide Map allowed conference goers to use an interactive web based map showing nearby bike stations and restaurants – an assortment from quick and cheap to fine dining. The neighborhoods were color coordinated and various restaurants were categorized and coded with icons showing what type of food they served. A link to the Planners Guide Map was provided in the conference app. A better description of the guide and easier access might have improved this feature.
    - The outreach materials consisted of Facebook/twitter posts that highlighted various sustainability features of the conference, but most importantly information on how to ride share and find other convenient multi modal methods of travel.

2. Things that worked out well that we suggest the 2019 subcommittee continues or pursues

    - Items described in number 1, and also Sustainable Food options. However in our instance, they were not well advertised at the event; recommend signage. Programs that focused on sustainability were excellent. The promotion of Birds and Lime Bikes were a success.

3. Things that were a challenge and what to do differently or how to change how we did it

    - Promotion of the carpool site could have been improved. Facebook seems like it was used more than anything else, but social media is not the only platform. With a busy schedule, some messages were likely overlooked by attendees. I think more up-front sustainability messaging at the site would have served conference goers well. Despite online materials being available, a lot of paper was used to make the conference programs. A Sustainability or Local Section Booth, or something to this affect, could help further promote sustainability / local opportunities.

4. Something we didn't expect and it was the most challenging thing we had to deal with

    - Coordination with the event manager directly, layers of communication. Limits on just how much the committee can influence in terms of printing, on-site amenities, etc.

5. Documents or guides that you prepared that you recommend the 2019 subcommittee uses – either attach it/them or offer to send them –

    Betsy has the Planners Guide Map as does Francine Farrell. We are happy to send any other notes or guides.

Student Programs Subcommittee Report
Mimi Morisaki and Melanie Tylke Co-Chairs

1. Best thing we did that was successful

- Pub Crawl was successful with over 30 attendees
- We identified sessions and events early on
- Divided up responsibilities for sessions and events early on
- Held monthly meetings with our volunteers
- Made an announcement at the CPF Student Luncheon to let the students know about the ongoing sessions and events throughout the Conference
- Contacted the session speakers well in advance to notify them of their session room and time slot.

2. Things that worked out well that we suggest the 2019 subcommittee continues or pursues

- Pub Crawl – a 21 and up event is a fun ice-breaker
- Career Poster Session – Fehr and Peers reached out to us to sponsor for Student Day somehow and we came up with the idea of a poster session with different firms and agencies willing to showcase their work and any open positions they have
- Design charrette – We tried to organize a charrette early on in the planning process; however, the case study did not pan out. But, we still recommend the opportunity for students to participate in a design charrette next year - particularly with a location that is nearby the venue so the students can participate in a site visit and drawing session.

3. Things that were a challenge and what to do differently or how to change how we did it

- Overall: Venue location and transportation to/from venue for Walking Tour and Pub Crawl. Fortunately, we learned that there would be Lime vouchers for conference attendees so we used that as an option for people to get from the venue to the Walking Tour. Additionally, people were willing to split Uber/Lyft rides with others.
- Resume clinic: Should be fit in on the student day somehow. We had interest from planners who wanted to participate, but we only had 2 students show up. Signage for that day would have helped.
- Student Housing Match Program – while the program didn't pan out the way we hoped, we still think it is worth trying again and trying with planners that may be empty nesters/have homes with extra bedrooms.

4. Something we didn't expect and it was the most challenging thing we had to deal with

- Walking Tour – Unfortunately, the volunteer tour guide was too busy to coordinate in advance, and despite the committee's best efforts, there were last minute meeting location changes that precluded most of those students who signed up from attending.
- Session Presentations – This wasn't challenging, however, it would have been nice to know that our Student Day speakers should be prepared to submit their Powerpoint presentations.
- Session room logistics – Again, not challenging, but something to keep in mind when coordinating speakers… Find out if the room is equipped to handle both Microsoft and Apple computers and whether the venue has laptop adapters.

5. Documents or guides that you prepared that you recommend the 2019 subcommittee uses – either attach it/them or offer to send them

Our committee created a Gmail account to house all the 2018 Student Committee meeting agendas, sign-up forms, fliers, and emails. We are happy to share this information with the 2019 committee

Volunteer Subcommittee

Committee Chair – Sharon Singleton, 619 788-2129, sharon@ktua.com

Primary volunteer responsibilities: Assist APA staff with check-in; distribute badges and bags to pre-registered attendees; direct people to the correct registration line; stuff bags; assist with CPF auction; load buses for tours and opening reception.

Timeline:

- Started getting the word out about the need for volunteers in late spring. Announcements through CAL APA, the San Diego Section and YPG were very helpful.
- Maintained a list of interested volunteers and sent out a Google Sheets link to everyone on the list in late summer to start getting commitments once volunteer shifts/responsibilities were identified. Sent out reminders to everyone on the list every couple of weeks leading up to the conference.
- Sent a confirmation to volunteers of their shifts two weeks before the conference and again a couple of days before the conference. Several people dropped out at this point as school/work schedules had changed.
- Walked the conference site with Betsy McCullough a couple of weeks before the conference so that I could get a good understanding of the physical layout of the various spaces.

2018 Contacts:

- SDSU - Sherry Ryan - sryan@mail.sdsu.edu
- UCSD - Mirle Rabinowitz Bussell - MBUSSELL@mail.ucsd.edu; Sue Peerson - speerson@ucsd.edu
- UC Davis
- Cal Poly SLO - Mike Boswell - mboswell@calpoly.edu, Janet Murrieta, Administrative Support, jmurriet@calpoly.edu
- Cal Poly Pomona - Laura Fujimoto-Hernandez, lhernandez@cpp.edu
- San Jose State - Richard Kos, AICP, richard.kos@sjsu.edu, Hing Wong, hing@hingwong.info
- UC Irvine - Jae Hong Kim, jaehk6@uci.edu
- UCLA - Alexis Oberlander, vmukhija@ucla.edu, danielle@luskin.ucla.edu, paul@luskin.ucla.edu
- UC Santa Barbara - Paul Wack, AICP, pwack@calpoly.edu
- USC - Jennifer Hong, **jenc@price.usc.edu**
- UC Berkeley

Successes/Challenges/Things to Change:

- I received a lot of interest from the students early in the process (53 people). About 20 students ended up signing up to volunteer, but some of them had to drop out at the last minute due to scheduling conflicts.
- There was concern that the students wouldn't be interested and/or available for Sunday as it was the student day. That actually was not a problem, it was more difficult to get student volunteers for the other days. If they had signed up for the conference, they wanted to attend as many sessions as possible. If they were local, they didn't want to miss class or work.
- The pricing structure for students was very confusing – I ended up answering many questions about this as it was less expensive for them to sign up for individual days at the student rate rather than the whole conference student rate.
- There were a handful of young members interested in volunteering so that they could attend half day for free, most of them are currently looking for jobs. I explained that young members were not eligible for the same student benefits. They were okay with this and still volunteered (I promoted the networking benefits).
- Since most of the volunteers were needed for registration assistance, those shifts ran from 7:00 am to 12:30 pm and 12:30 to 6:00 pm. That is a long time. I would suggest four hour shifts max (this fits with the student requirement to volunteer 4 hours for the half-day comp attendance). In the Google Sheet, I had broken down

the various volunteer responsibilities (registration, CPF auction, load buses) as separate line items. In the future it would probably be better to list the shifts (7 am – 11 am, etc) and then assign people to the areas needed when they arrive to provide maximum flexibility and simplify the schedule.

- Local section and state board members volunteered on Sunday - this was extremely helpful. Maybe as an incentive to get board members and young planners to fill in the volunteer gaps when students are not available, offer a drink ticket to one of the events. It's not much, but the drink tickets were in high demand!
- Sunday was very busy, Monday moderately busy, Tuesday and Wednesday pretty quiet.
- I did not have a co-chair and that was fine for all of the pre-conference work. However, a co-chair during the conference would have been helpful to help direct the volunteers and answer questions. I was able to attend a few conference sessions during quiet times and was in the registration area during the rest of the conference.
- The volunteers were wonderful – they did anything that needed to be done with a smile. And most of them were perceptive enough to see where help was needed and jump in with assistance.

General Conference Observations Regarding the Registration Area & Process from the Volunteer Coordinator who spent most of her time in the Registration Area

I heard lots of great compliments about the conference, but also had an opportunity to see first-hand some of the behind the scenes activities.

- Sunday was crazy, particularly first thing in the morning. Computers were not set up until after 6:45 am with people starting to check-in at 7:00 am, and then there were technical difficulties with no electrical outlets downstairs and connecting the computers and printers. Since registration was in a temporary location for check-in for the student and pre-conference sessions, there was no signage directing people to the appropriate line.
- I would estimate that approximately 10% of the pre-registered attendees forgot to bring their badges.
- Badge packages were available for pick up for those who registered later, or whose packages were returned by the post office. I would estimate that 25-30% of the people who were preregistered and who did not receive their package in the mail did NOT have a package waiting for them at the registration desk. Most of them had their registration confirmation emails and had registered very early in the process rather than later. While most were understanding of the process, there was some frustration in having to stand in multiple lines to confirm their registration and then get a new badge printed, particularly if they were trying to get to a session on time.
- It seems that about one-third of the registration packages never got picked up. It appears many of them were duplicates. The person would bring their badge to check-in to get their bag and program, but there would also be an envelope there with their name on it.
- AICP ribbon – these were in high demand and we had very few to give out.
- Drink tickets – it seems that everyone who received their badge in the mail also received two drink tickets. Some of the registration packages that were picked up had one or two drink tickets, some did not. There should be some consistency in the distribution of the tickets.
- Mobile workshops – 1) since tickets were not distributed for the mobile workshops as in past years, some people couldn't remember which tour they signed up for – this was easily solved by having them check at the mobile workshop desk; 2) the mode of transportation/meeting location for some of the tours was not very clear – creating some frustration for participants; 3) some tours included a meal, some did not – more confusion. I would suggest that each tour leader reach out to the members of their tour group a couple of days before the conference to remind them about the tour details.

Special Events Subcommittee

Bill Chopyk and Greg Mattson Co-Chairs

Healthy Breaks

1. Best thing we did that was successful:
   We tried something new this year – healthy breaks during "lunch on your own".

2. Things that worked out well that we suggest the 2019 subcommittee continues or pursues:
   Suggest having some kind of health break component during the conference. It could be a morning jog, an evening walk, a stretching session during breaks.

3. Things that were a challenge and what to do differently or how to change how we did it:
   Participation was very low. Only 6 participants for yoga stretching on Monday. Only 5 participants for aerobics (Zumba) on Tuesday. It was very challenging to coerce planners to participate in the healthy breaks. Some things to consider:

   - Find volunteers to conduct the healthy break sessions.
   - Find a suitable location for exercising.
   - Post signs directing planners to the healthy break location.
   - Allow time for people to change clothes.

4. Something we didn't expect and it was the most challenging thing we had to deal with:
   Most challenging was finding people who actually have interest in healthy breaks.

Opening Reception

1. Best thing we did that was successful:
   A "Great" venue….so many planners had not been on the Midway and thought it was cool to walk amongst the planes and flight decks.   Band - A fun and animated flash back to the 70-80's and a photo booth was well received and we found a great guy who engaged the planners and had fun with them. We worked with the band to watch their volume so that the planners still could move about and hold conversations in our enclosed venue.

2. Things that worked out well that we suggest the 2019 subcommittee continues or pursues:
   Depending on the venue (very important for a drawing out the planners) music can is a good idea….the photo booth theme was good or something similar…..night event is challenging. One idea that came up late was a circus theme…with performers roaming around to entertain or photo opportunities with planners vs. a static location. Could be interesting….

3. Things that were a challenge and what to do differently or how to change how we did it:
   Suggest if you have a band or trio or DJ or entertainers for the event….make sure you tackle the venue insurance and rider from APA. We got this cleared a bit too late…anxious moments. Also, setup time at least 1.5 hours in an advance, access, security clearance, electrical needs and amps.

4. Something we didn't expect and it was the most challenging thing we had to deal with:
   As noted above, insurance and access…..of course costs is always challenging…….

Publicity Subcommittee

Betsy McCullough, co-chair

1. Best thing that we did that was successful:
   - Find a graphic designer who works at a local firm who can take content from the subcommittee and create posts for Facebook, Twitter, Instagram and Linked In. it took us several months to find someone but we finally did in the spring which was just in time
   - Create a schedule for posts that will start in the spring – we did 2-3 per week in general – did one each day the last week before the conference

2. Things that worked out well that we suggest the 2019 subcommittee continues or pursues:
   - Create the schedule of publicity with the Chapter due dates from the Production Schedule in mind. Set up a schedule and put all ideas on it and set them chronologically. They may switch over time depending on some Chapter deadlines but keeping them all visibly in front of you is very helpful
   - Incorporate the Chapter-produced graphics into your posts so that you're not recreating or duplicating their design efforts
   - Promote highlights of your conference in many of the posts. Things of local highlights to promote as well
   - You don't need to start posting regularly on social media until the spring – e.g., after session submittal period is closed and then you can start with Chapter items
   - Have the subcommittee member prepare the text and, if possible, find the properly-sized graphics to accompany the text
   - If you haven't created posts before, keep the text short and use graphic images and headlines to attract attention because some of our media platforms accept less text

3. Things that were a challenge and what to do differently or how to change how we did it:
   - Find the graphic designer EARLY! We had someone who told us they could do it back out after leading us on for a few months – she had no time is what she told us, but she really didn't know how to do the work.
   - Don't expect the other subcommittees to prepare postings for you to have posted – they have their own tasks to pursue. And don't expect to have a great idea and have outsiders implement it – we tried to get 'teases' from local jurisdictions to attract attendees to go to see their city and solicited through our regional government, but no jurisdiction came through
   - While we had up to 4 people on this subcommittee at one time, it came down to one person working on 75% of the products. It wasn't overwhelming because that person is retired, but if you have working folks on the subcommittee, have 2 strong lead people do the work
   - 'Section Ads' that Dorina Blythe prepared are probably an outdated way of getting information out and content development for them seemed out of step with the rest of the efforts: suggest they not be done.

4. Something we didn't expect and it was the most challenging thing we had to deal with:
   - Finding a skilled graphic designer to do the posting: your local firms will be contributing staff to other subcommittees and to sponsorships, so followup is needed – a general call out for a graphic designer may not work.

5. Documents prepared to share:
   - A close-to-the-end list of posts and timing is on the next page.

PUBLICITY SUBCOMMITTEE SCHEDULE

Publicity Schedule Week of July 9 (Week #13) through October 1 (Week #1)
For Conference Facebook, Twitter, LinkedIn, and Instagram platforms + Chapter Facebook & Website
Rev 10/2/18

# Weeks Prior	Post #1			Post #2	
	Earliest posts in Spring 2018: Iconic San Diego series of posts; online registration open; Section Ads #1 & #2; Cal Planner – back page on conference promo				
	7/3 – Student Day Flyer 7/6 – Early Registration Deadline Reminder				
13 7/9	Opening Reception Promo - 7/13			Historic Destinations on your own – 7/18	
12 7/16	Opening Keynote Promo – 7/20			APA California 70th Anniversary Tease – 7/24	
11 7/23	Pre-Conference Session Promo – 7/25			Mobile App Use Promo – 7/27	
10 7/30	1st - Mobile Workshop Highlights [bike tours] – 8/3			San Diego: Downtown – 8/8	
9 8/6	Closing Keynote Promo – 7/30			Sustainability Promo 1 – Sheraton overall 8/17	
8 8/13	2nd - Mobile Workshop Highlights [S1, M2, T5, M4] – 8/14			Sustainable Promo 2 – getting around from the hotel – 8/24	
7 8/20	Commission & Board Agenda Promo – 8/10			Added: Student Housing Promo – 8/22	
6 8/27	Long-Term Sponsor Recognition: 8-yr sponsors – 8/28			APA Band/Plan It Rock – 8/31	
5 9/3	Reminder about end of Regular Registration Next Week on 9/7 incl CPF donation - 9/4			Long-Term Sponsor Recognition: 5-year sponsors – 9/7	
4 9/10	Look for reg packet in the mail and bring it [see FF's language] - 9/11			Sustainable Promo 3 – getting to/from the conference via pub trans & carpooling [moved from 8/20&27] –9/14	
3 9/17	MWs with space left – 9/17 Post about History Document available – 9/19			Pre-Conference space still available – 9/21	
2 9/24	Come to the Conference & Be a Sustainable Conference-Goer 9/27	2nd Reminder to look out for registration packet in the mail. 9/25		Keynotes promo; questions for Todd; 9/28	
1 10/1	UCSD/SDSU Alumni Mixer 10/1	Rideshare Promo 10/2	Planners Guide 10/3	CPF Auction & major items tease 10/4	We're So Excited to See You! w/CHC photo – 10/5

APA CALIFORNIA WELCOMES STUDENTS!

APPENDIX U

A RESILIENT FUTURE **2019**

CALIFORNIA APA CONFERENCE
SANTA BARBARA
SEPTEMBER 15-18

FREE Student Day - Sunday, September 15

Registration required. Check out the conference website for additional information.

8:30 am - 9:45 am	Preparing the Planners of the Future
8:30 am - 9:45 am	Resilience Starts with Me
10:00 am - 11:15 am	CEQA: It Will Result in Significant and Unavoidable Impacts on Your Planning Career
10:00 am - 11:15 am	Interviewing 101: Put Your Best Foot Forward
2:45 pm - 4:15 pm	Student Walking Tour
	Limited to 30 attendees

The Student Programs Committee for the APA California Chapter 2019 Conference is making strides in conference planning efforts. The Student Programs Subcommittee is tasked with planning and selecting the sessions and activities/events for **Student Day**, which will be held on Sunday, September 15. The **Young Planners Group (YPG) and Student Mixer** is historically an event that emerging planners are encouraged to attend. Check out our **Student and Emerging Planner Mixer** event information and flyer for more information. Hosting the conference in Santa Barbara lends to capitalizing on student attendance from UCSB and Cal Poly and other nearby universities, as well as provides access to resources at each of the schools. We also expect to see a high turnout of young professionals this year. We are very excited about this years **Student Day Sessions** and think the 2019 conference boasts a great geological location and an opportunity for more fruitful discussions about a variety of topics. . The Student Programs also offers additional events, including a **Walking Tour of Downtown Santa Barbara**, a **Networking Luncheon** with professional planners, and **Professional Headshots**.

Student and Emerging Planner Mixer

Join fellow emerging planning professionals and students from across the state to mix and mingle. Please contact Student Programs Chair Rachel Raynor at *rcraynor@rrmdesign.com* if you have any questions. Light appetizers will be served. We hope to see you in Santa Barbara!

Student Walking Tour - *Limited to First 30 to Register*

Enjoy a walking tour of Downtown focused on the history and hearing the story of the City flipping from a Victorian-inspired town to a Spanish Revival town, with the help of a few visionaries and the aftermath of the earthquake in 1925. Transportation will be provided. Better hurry and register for this free event! Registration is capped at 30 for transportation purposes. Don't forget your walking shoes.

Connect! Networking Luncheon

Connect with conference attendees and get one-on-one feedback, insights, and tips from fellow APA members/professionals who have volunteered their expertise and time to connect and share their knowledge with emerging planners.

Headshots

Dress for the job you want and make sure to smile for the camera. A professional photographer will do the rest! First come, first serve!

Volunteering

Calling All Students and Professionals!

Volunteer at APA California 2019 to meet other professionals and students, and to support APA California. Students volunteering for four hours or more will receive free conference admission for the day. Please fill out the Google Form *https://forms.gle/yr2L1TKZnQG6e6or5* to sign up. Contact Selena Evilsizor at *selevilsizor@gmail.com* or (805) 637-4722 for more information.