



American Planning Association
California Chapter

Creating Great Communities

Strategic Planning

October 2, 2021



Agenda



9:30 am

Getting Started

9:45 am

Setting the Foundation:
Mission, Vision, Core Values

11:00-11:15 am

BREAK

11:50 am

Where Are We Now?

- SWOT Analysis
- Program Analysis
- Envision Assessment

12:00-12:15 pm

LUNCH

12:35 pm

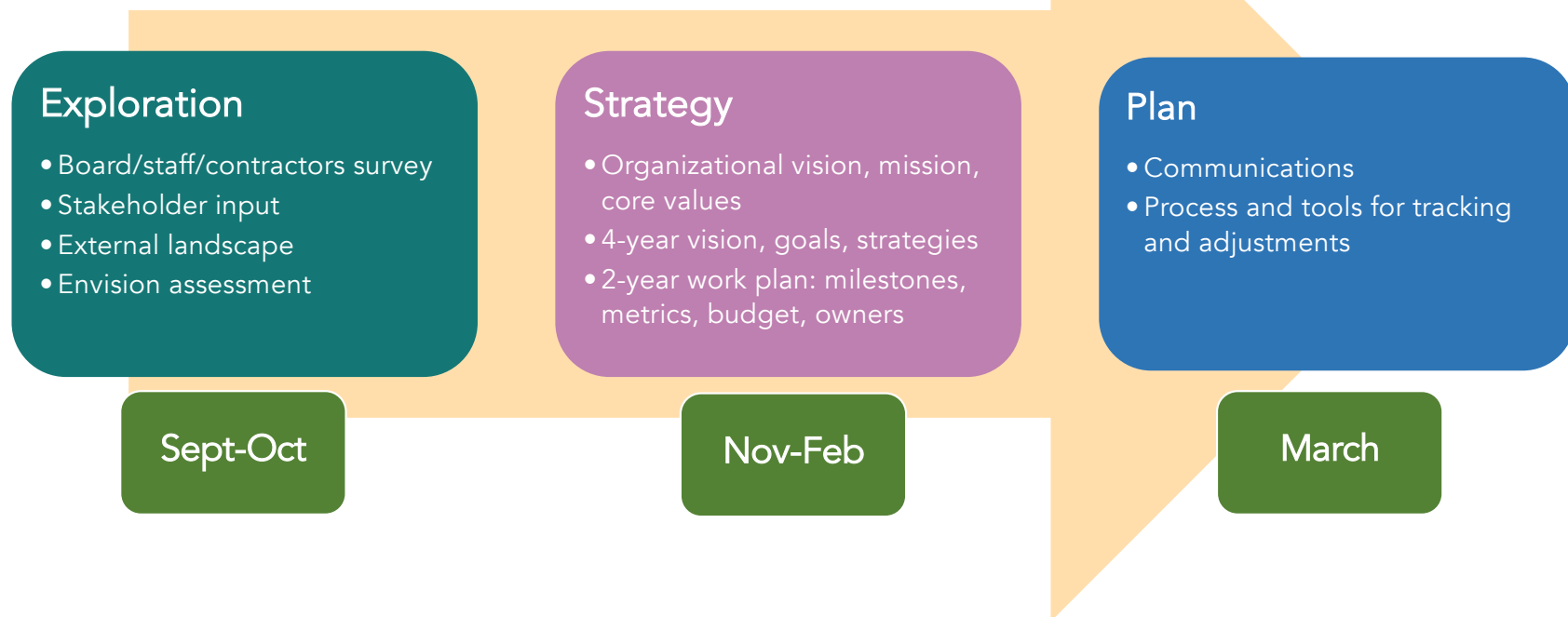
Where Do We Want to Be in 4 Years?

1:20 pm

Next Steps and Closing

Getting Started

Strategic Planning Process



Start With "Why"



What are your primary reasons for being involved with APA California?



"Put my long years of Planning education and experience into good use"

"Desire to make an impact in the planning field across the state"

"Colleague Camaraderie"

"Strengthen the profession"

"To influence planning policy"

"Opportunity to give back to planning community"

Setting the Foundation

Current Mission Language



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.

Purpose of a Mission Statement



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Mission as Core Purpose



How Board and Staff describe core purpose:



"To *advocate* for planners and planning positions and to serve as *resource* of state and national best practices and legal changes to the planning landscape."

"To *represent* the planning profession and provide *opportunities* for continued growth and development. And to also advocate for the policies and programs that the field of urban planning support at a state and national level."

"To create a *network* for career planners in the State. To share *ideas* about current planning issues. To form events and conferences for professionals to *meet and learn* from each other."

Mission as Core Purpose



How members describe core purpose:



"Supporting planners and communities in order to create physical and societal frameworks and structures that benefit all present and future stakeholders."

*"To be at the **forefront of topics/issues** that change the planning practice and to understand them and implement them in meaningful ways."*

*"A professional organization for planners to **stay involved** and continue to **learn and improve** our communities and our profession."*

*"To increase the **knowledge and skills** of planners in California."*

*"To **bring together** planners throughout California to promote a **unified front** for the planning profession and to learn from each other."*

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How Members Describe APA California



networking professionals development support chapter education group state california association planning land urban professional members good apa organization issues field city planners communities resources opportunities

"A great organization and wonderful community of intelligent thoughtful professionals who make the world better every day"

"Professional organization for California planners, students, and allied professionals, with membership open to all. Organization provides professional support and training opportunities to members and advocates on state legislation that affects planning policies and practices."

"THE organization where professional planners share ideas, improve their professional knowledge and skills and advocate for good planning outcomes at the state level and in our communities."

"A professional organization dedicated to helping urban planners stay informed and providing a means to share emerging best practices to improve our communities"

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Components of a Mission Statement



WHAT do
we do?

WHO do we
serve?

HOW do we
operate?

WHY does it
matter?

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Purpose of a Vision Statement



“We envision a world in which...”



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Visioning Exercise – Small Groups



Brainstorm the following questions for 15 mins:

- What is your aspiration for the long-term impact of APA California? (*Think 20-30 years from now*)
- How will the planning profession be different decades from now because of APA California?

Please assign 1 person to take notes, and then share with everyone when we come back.

Current Values



On APA California website:

Vision
Leadership
Diversity
Support
Tools, Services and Support

In 2021 work plan:

Collaboration / Communications
Equity / Inclusion
Trust / Respect / Relationships
Joy / Fun
Accountability / Professionalism
Achievement / Impact
Service
Creativity
Advocacy
Vision
Balance






What Core Values Do



- Govern personal relationships among colleagues
- Guide business processes
- Clarify who we are
- Articulate what we stand for
- Help explain why we do business the way we do
- Guide us on how to interact with readers
- Inform us on how to reward
- Guide us in making decisions

What Core Values Are Not



-  Slogans
-  Operating practices
-  Business strategies
-  Skills
-  Programs or activities

APA
CA



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4-YEAR VISION



Board & Staff Initial Input



What do you believe are the top three core values of APA California?

Top values mentioned:



Inclusion
Equity



Excellence in planning
Professionalism
Leadership



Education
Collaboration



Creating strong communities /
sustainability

Other values mentioned:

- Diversity
- Advocacy
- Transparency / Accountability
- Ethics
- Respect
- Engagement
- Service
- Represent public interest
- Camaraderie
- Prosperity
- Sharing
- Open-mindedness

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Member Input



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Brainstorming Our Core Values



THOUGHT STARTERS

What core beliefs form the “why” of APA California?

What principles guide our day-to-day work?

When I’m facing a tough question in my role at APA California, what helps me arrive at a decision?

If APA California were a person, what characteristics or personality traits would I use to describe him/her?

You have 15 mins in small groups to brainstorm your top 4 core values. Assign 1 person to take notes, and then share with everyone when we come back.

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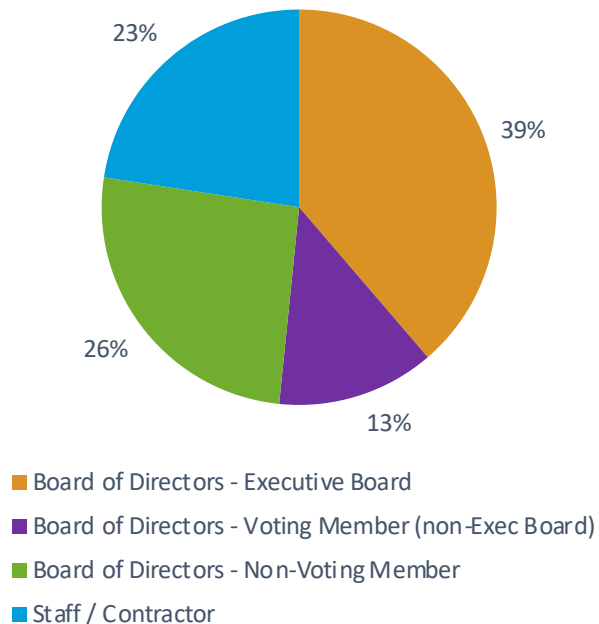
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Where Are We Now?

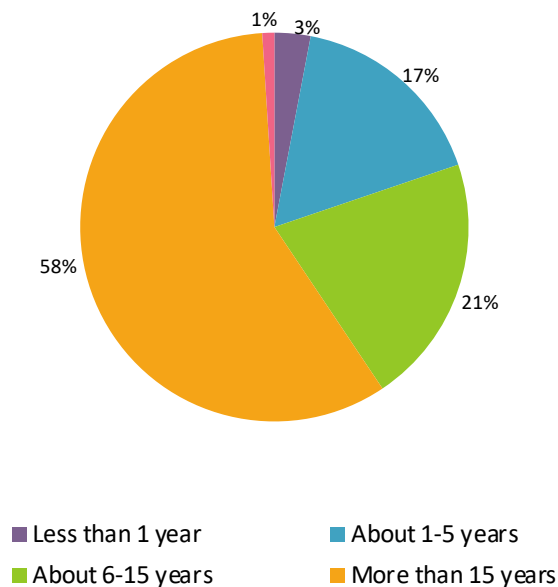
Internal and External Stakeholder Research



Internal Survey: 31 responses



Member Survey: 101 responses
Length of Membership



Past Member Survey: 34 responses

Stakeholder Interviews (in progress)

- Peer / Allied organizations (5)
- Planning-related advocacy groups (5)
- Legislators/staff (2)

Stakeholder Focus Groups (to be scheduled)

- Non-members
- Young & Emerging Planners

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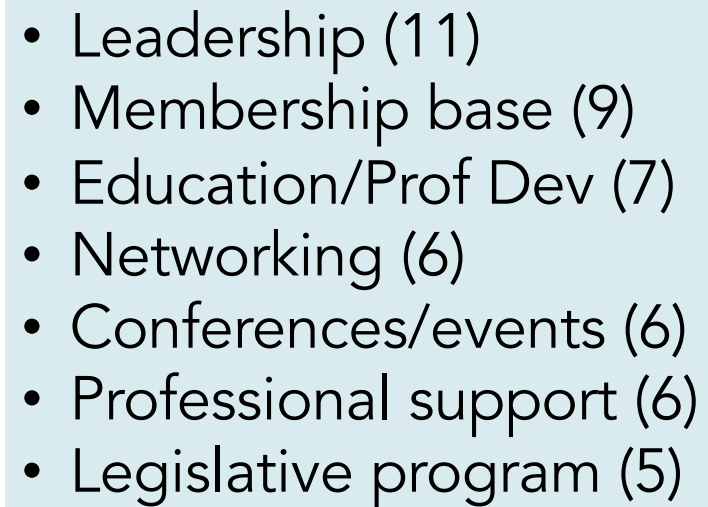
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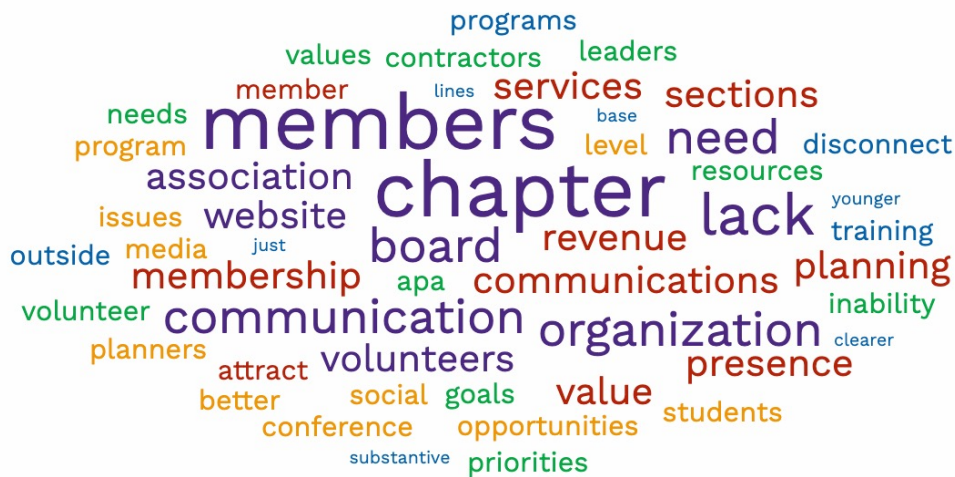
Internal Assessment Components



- Strengths & Weaknesses
 - Board, staff survey
 - Member input
- Program Impact Analysis
- Envision Organizational Assessment



Weaknesses



- Organization structure/capacity (13)
- Membership engagement/pipeline (11)
- Communication (10)
- Program cost effectiveness/member value (10)

Program Priorities



Programs to Grow / Expand



Programs to Reduce / Stop



Programs to Add



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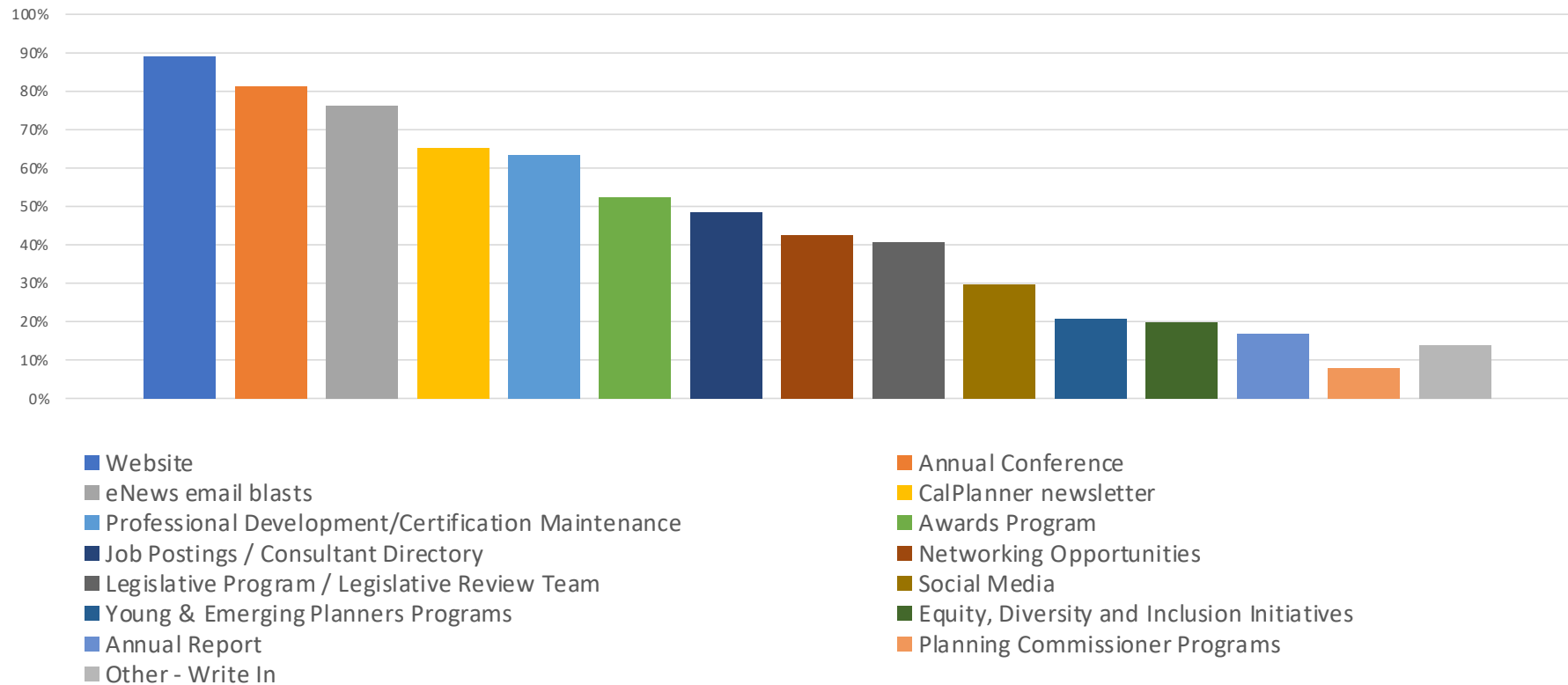
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Members: Which Programs/Services Do You Use?



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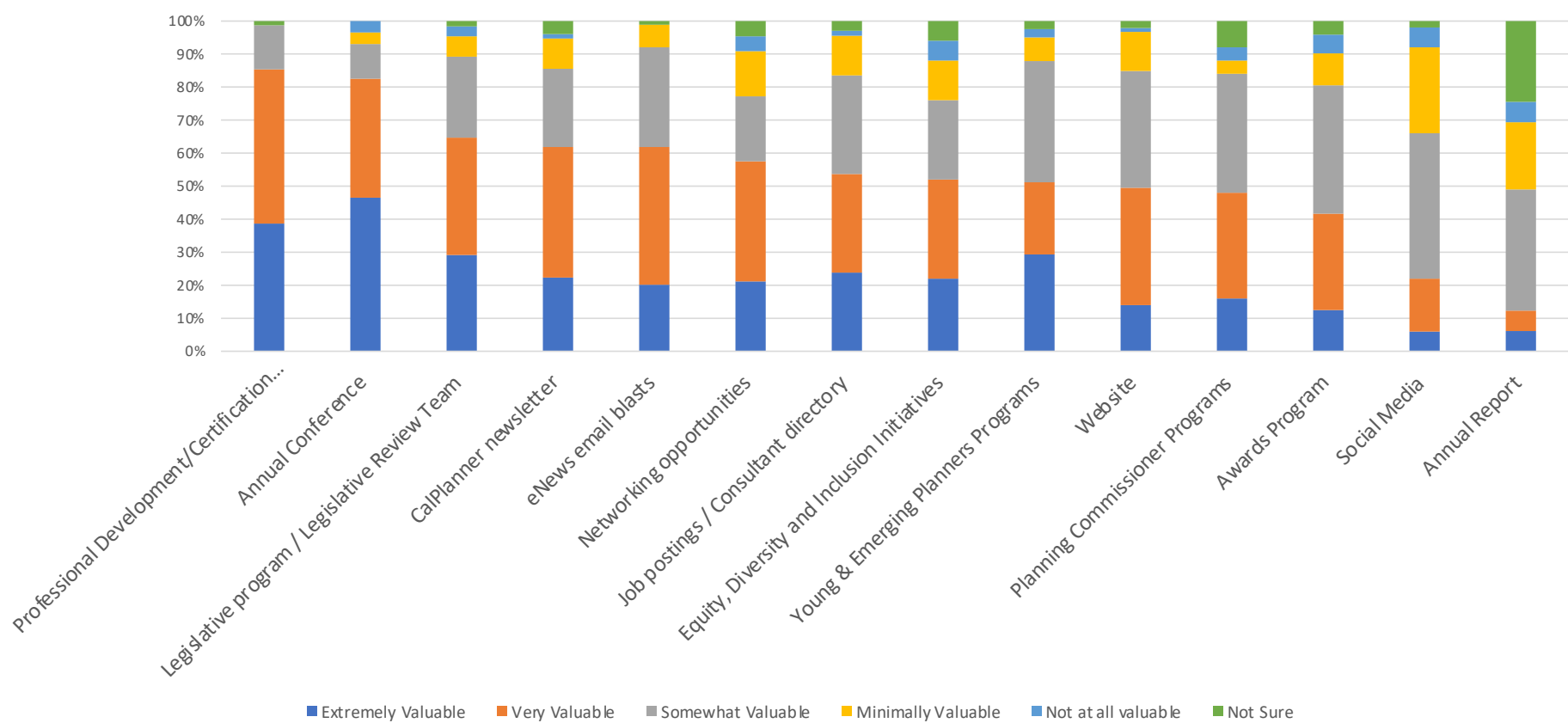
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Members: Which Programs/Services Do You Value Most?



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Members: What Other Programs, Services, Content Could APA California Offer That You Would Find Valuable?



- Leadership & management training (4)
- Expanded “specialty” training for CM (3)
- More topical webinars (3) – e.g., climate change, affordable housing, CEQA lawsuits, aging population, equity
- Field trips (possibly virtual) & case studies highlighting best practices in CA and beyond (3)
- Affinity groups by interest (3) – e.g., rural planners, women with children
- Annual advocacy day at Capitol (2)

Envision Assessment



GOVERNANCE

- Much of governance set by national APA.
- Very detailed bylaws with involved process to update. Consider streamlining bylaws and supplementing with policies & procedures document that allows leadership more flexibility in implementation.
- Well-organized meeting agendas, materials, and communications to Board.
- Are full-day Board meetings still working for everyone? If not, consider expanding to 5x/year for 2-3 hrs/meeting, plus 1-2 day retreat.
- Many planning documents, some required by national and some developed by chapter. Use new strategic plan and work plan to streamline planning docs and tracker – and directly connect strategic plan to work plan.
- CPF, PEN and CPR have separate governance. Is this structure still working for APA?

PROGRAMS/MEMBERS

- Programs and services are viewed very favorably by membership. Chapter's offerings are extensive. Possible opportunity to streamline based on similar programs/services by sections and/or other orgs?
- Consider ways to further enhance communications section-to-section and chapter-to-section.
- Chapter lost members as of Aug 2021 report (all sections except Central Coast). Related to pandemic or bigger trend?
- Continue focus on building pipeline of young and emerging members and retaining through mid-career.
- In June 2021 member demographics survey, chapter was more diverse than national stats, but still majority white.
- Clarify unique value of APA California membership and involvement.

OPERATIONS

- Conduct biennial technology audit to ensure systems and procedures are efficient, effective and secure.
- Insurance policies appear to be appropriate for org scope, size and operations.

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Envision Assessment



PEOPLE

- Dependence on contractors, no full-time staff. Consider shifting 1-2 contractor roles to staff. Look at best practices from other chapters and orgs.
- Consider more formal, ongoing succession planning for officer and leadership roles.
- Relatively short terms for elected officers and appointed advisors make pipeline recruitment and succession planning essential and challenging. Consider longer terms and/or new strategies for recruitment.
- Are there any tensions between leadership recruitment at section vs. chapter levels?

FINANCE

- Strong, detailed financial policies.
- Healthy surplus each of last three years, with net profit margins of 12-23%. Develop strategy for use of savings, beyond 3-6 mos of operating reserves.

REVENUE MODEL

- Membership dues and conference fees are and will likely continue to be primary revenue drivers. Growth of subscriptions/digital ad revenue in recent years seems to have potential for further development.
- Webcast/workshop revenue might have greater potential as sponsorships.
- Look at new trends from other successful chapters for revenue ideas.

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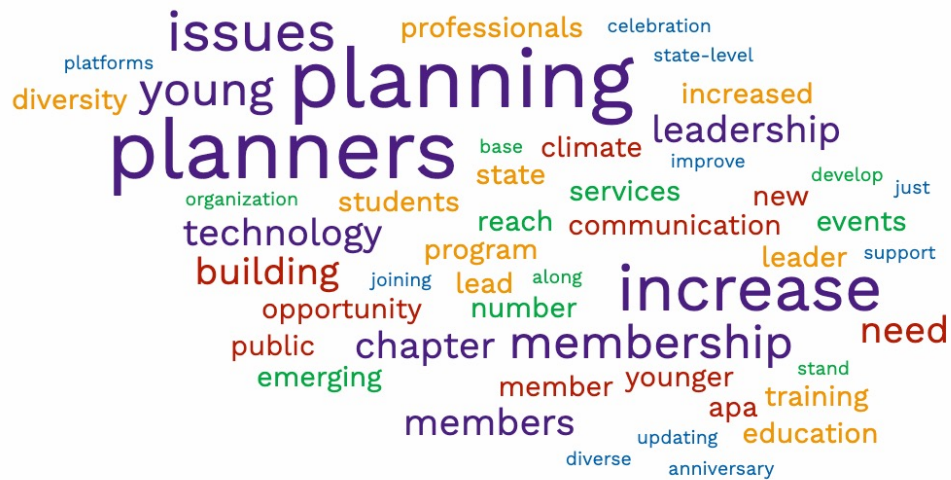


External Assessment Components



- Opportunities & Threats
 - Internal survey
 - Member input
- Landscape Research

Opportunities



- Emerging younger, more diverse planners (13)
- Technology – online programming, resources (6)
- Need for leadership voice on statewide issues (6)
- Changing program needs of membership base (5)

Threats



- Competition for members / engagement (9)
- Misunderstandings of profession/perception of relevance (9)
- Declining membership base (4)
- Economic / pandemic related challenges (4)

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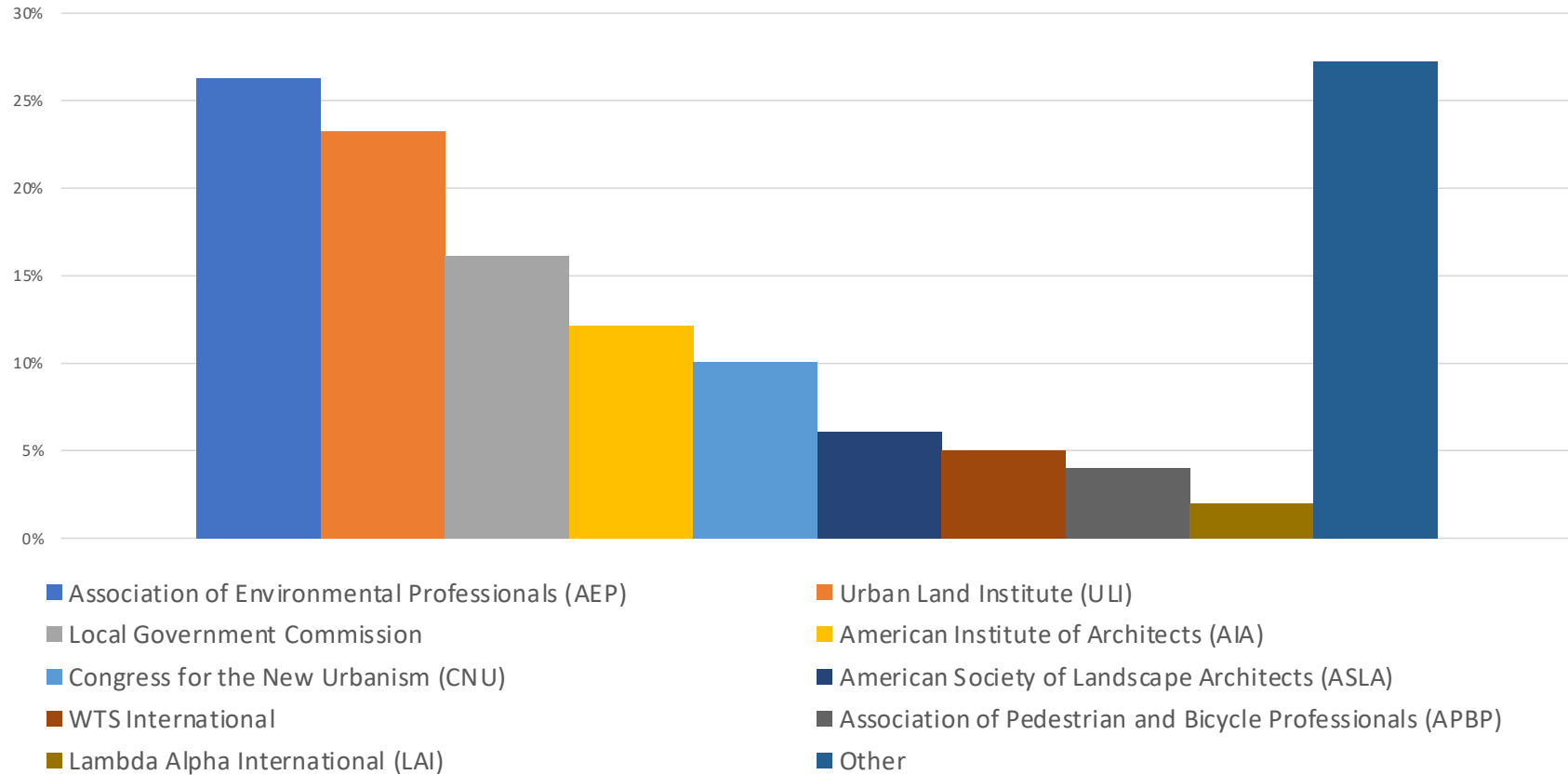
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Member Feedback – Membership in Peer Organizations



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Member Feedback – Value of Peer Organizations



"I find ITE's chapter meetings much more useful than APA's meetings. For one thing, they are held as lunches, which facilitates interactions with other people at the table (the APA meetings are done lecture-style). There is also a greater variety of speakers and it is easier for someone to get into the program."

"I have many colleagues who prefer to be members of the Progressive Planners Network (PPN) than APA because they feel more represented as activists, academics, non-traditional and traditional planners. PPN pushes harder for equity and fundamental change in how decisions are made in our global society while APA is slowly working towards this."

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Landscape Overview



Allied Professional Membership Organizations



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Advocacy Organizations



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Peer State APA Chapters



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Making Great Communities Happen
 division
consulting

Where Do We Want to Go?

4-Year Vision



"A thriving organization with a *clear vision and mission*, an *engaged membership base*, *representative leadership*, *healthy fiscal foundation*, and *staff support* to assist in implementing its priorities."

"A *7,500-member organization of diverse planners and students* that plays the *leading role in state planning* activities; with a targeted and efficient organizational and staff structure; and *successful implementation* of 4-year Strategic Plan goals/strategies/programs."

"Our internal *"house"* will be *orderly and modernized*, we will offer more opportunities for *members to engage with the Chapter around issues important to them*, and we will have a consistent and successful practice of *supporting emerging/diverse planners*."

\$1 Million Question



"Student and mid-career *scholarships; fellowships* for mid-career professionals needing support and development; MIS systems to help produce *data to demonstrate measurable outcomes*; better fund organization's *archives and oral history programs*"

"Create a *communications and research arm* of the Chapter to allow planners to stay ahead of emerging issues, increase the Chapter's role in *shaping legislation, publish best practices, and develop/identify solutions* to hot planning issues in the state."

"More *paid programmatic support* ...; development of a strong *educational and professional development and leadership program* that support planners at all levels of their careers; *educational program* ... on what planning is and why it is important [for] lay people and ... policymakers/elected officials. *More training for APA CA chapter and section leadership including YEP.*

Member Input on Vision



*"Diverse membership and leadership at the state and section levels; **greater partnerships and visibility with allied organizations**; stronger **education and advocacy** role to state legislators and local decision-makers on the perspective and priorities of the planning profession; increase in APA membership (set a membership target and action plan)."*

*"Continue to **foster young planners** and instill in them the ability to continue to **advocate for core planning values** including but not limited to protection of the natural environment, provision of housing and shelter to all residents, promotion of diversity/equity/inclusion in all actions, and addressing the threat of climate change."*

*"Become known as the **premier organization** that local governments, the state, consultants, and advocacy organizations go to for the **best available information & insights about good planning related to California**."*

Articulating the 4-Year Vision – Small Groups



Brainstorm the following questions for 15 mins:

What is our vision for APA California in 4 years?
What will the organization look like?
What will we accomplish?

Please assign 1 person to take notes, and then share with everyone when we come back.

Closing & Next Steps



- October: Envision completing stakeholder interviews and focus groups, analyzing past member survey data. Full reports to be provided.
- By Oct 15: Envision provides summary of Board meeting discussions/decisions and detailed next steps.
- By end of Oct: Committee call to review Board meeting summary and next steps + stakeholder findings, advance discussion on 4-year vision/goals/strategies.
- Nov – Dec: Envision works with committee to finalize 4-year vision/goals/strategies framework (+ any budget implications), share with Board.
- Jan: Review and approve strategic plan, begin development of work plan at Board retreat.
- Jan – Feb: Envision works with committee to finalize 2-year work plan.