2019 – 2022
APA Pennsylvania Chapter Development Plan
“Promoting a Culture of Planning”

Approved by the APA-PA Board of Directors on
14 December 2018
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I. Acknowledgements

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II. Introduction and Background

The Pennsylvania Chapter of the American Planning Association (APA PA) is a nonprofit, non-partisan organization for the promotion of planning and for the support of professional planners and planning officials in the Commonwealth. The organization is one of 47 Chapters of the American Planning Association (APA). Approximately 2,400 members strong, with 1,272 who are also APA members, and 163 companies/agencies/counties, the APA PA works to promote planning at all levels of the Commonwealth through trainings, the annual conference, legislative monitoring and policy advocacy, and public awareness efforts. APA PA members participate in various statewide and regional groups with shared values and goals.

APA requires each Chapter to maintain a current development plan that provides direction for the Chapter’s organization, programs, and service delivery. The Chapter must be organized to be able to deliver member services. During 2018, the Chapter Board of Directors prepared a new Development Plan. A retreat was held in June 2018. Invited attendees included members of the Board of Directors, committee and PMPEI chairs, past Chapter presidents, and additional select Chapter members. The
Development Plan is a four-year plan, beginning in January 2019 and concluding in December 2022.

The 2014-2018 Plan, which involved a rigorous strategic planning process, is the basis for this Plan.

III. Mission

The mission of the PA Chapter of APA is to provide leadership in fostering excellence in community planning.

IV. Vision

The PA Chapter of APA positively influences the provision of planning resources and the practice of planning at all levels of the public and private sectors.

V. Values

The Pennsylvania Chapter of the American Planning Association believes:

• Planning is an essential local and county government function in all communities;
• Planning is comprehensive, inclusive, and serves the public interest;
• Planning incorporates the diversity of Pennsylvania’s communities, cultures and places;
• Planning facilitates consensus by balancing varied interests and resources;
• Planning addresses existing and emerging community concerns; and
• Planning includes implementation actions that effect positive change.

VI. Organizational Narrative

The Pennsylvania Chapter of the American Planning Association (APA PA) is a nonprofit, non-partisan organization for the promotion of planning, and for the support of professional planners and planning officials in the Commonwealth. The organization is a Chapter of the American Planning Association (APA). It was created in 1985 by the consolidation of three separate Chapters of the APA in Pennsylvania and the Pennsylvania Planning Association. The Chapter hosts an annual statewide conference, provides training to planning professionals and officials, and produces a quarterly newsletter. The Chapter hosts a website and various social media outlets. The Chapter partners with the Pennsylvania Municipal Planning Education Institute (PMPEI). The
PMPEI provides training to planning commission members, zoning officers, and zoning hearing board members throughout Pennsylvania.

The Pennsylvania Chapter of APA promotes a culture in which planning is a practical and routine means for communities to understand and manage the realities of change, make decisions based on rational analysis, promote innovative solutions, and initiate actions to improve communities and make them more attractive for desired investment, growth, and development.

The Chapter is organized into six Sections, which provide local service to members and others through program meetings, local workshops, newsletters, email blasts, and announcements.
VII. Chapter Priorities for 2019-2022 are:

1. Implement the Development Plan and Strengthen Organizational Capacity

2. Restart and reinvigorate the Legislative Committee

3. Orient and onboard new members and planning students

4. Research relevant planning topics and educate our membership
VIII. Strategies and Actions

1. Develop Human, Organizational, and Financial Resources to Ensure Implementation of the Development Plan

1a. Define implementation responsibilities of Development Plan actions and assign to board members, Section chairs, committee chairs, and committed individual members.

1b. Define clear roles and responsibilities for Sections and committees within the chapter organizational structure; review structure of committees and Sections as stated in bylaws.

1c. Develop an annual work program based upon the priorities of the development plan and realistically actionable tasks.

1d. Develop a standardized form for reporting progress to the Board of Directors on annual work program/development plan tasks, and

1e. Facilitate quarterly reports to the board of directors on plan implementation progress from Section, committee chairs, and individual members assigned work plan tasks.

1f. Review implementation progress annually and update work program as necessary.

1g. Develop a corrective action plan for use when needed to address lack of progress in achieving success in implementing Development Plan actions.
1h. Communicate Development Plan progress with chapter membership using means such as Vantage Point, the annual membership meeting, the website, the annual report, and e-news.

1i. Identify and recruit talented and committed members to assist in implementing the development plan.

1j. Identify and mentor members with leadership potential for committees, Sections, and board of directors.

1k. Develop the annual budget to support implementation of the annual work program and development plan.

1l. Review bylaws and revise to provide clarity and best practice for chapter organizational structure, and officer, executive committee, board of director, staff, Section, and committee functions, roles, and responsibilities.

1m. Review the role of the Education Committee as set forth in the bylaws and revise as necessary to establish clear service delivery functions for planning students, planning student organizations, and universities/faculty.

1n. Develop and/or maintain collaborative relationships with organizations with shared missions such as PMPEI, the Pennsylvania State Planning Board, the Pennsylvania County Planning Directors Association, municipal and count associations, and others.
2. Restart and Reinvigorate a Legislative Committee

2a. Recruit members and committee leaders who will actively participate in a working committee, often as a Lead on a specific aspect of the committee’s work (e.g. advocacy, evaluation, issue expert, etc.).

2b. Develop realistic committee objectives for short and long-term.

2c. Identify and contract with resources to provide tracking/notification on relevant legislation and develop a network of planning experts to evaluate and provide recommendations to the Board.

2d. Solicit constructive ideas and input from APA-PA membership for issues requiring legislative advocacy.

2e. Develop outreach program for legislators and agency leadership.

2f. Provide opportunities for APA-PA membership to directly advocate for legislation.

3. Orient and “Onboard” New Members and Planning Students to chapter membership benefits, services and volunteer opportunities for Chapter, Section, and committee projects and tasks

3a. Develop and document a standard new member contact and orientation protocol.
3b. Assign responsibility for new member contact.

3c. Connect to university students in planning and other programs regarding chapter membership.

3d. Participate in job fairs as outreach to students and others considering planning as a career option.

3e. Manage and distribute up-to-date new member data from APA to Sections and committees to facilitate contact, orientation, and outreach efforts.

3f. Appoint a vice-chair or co-chair for each committee and Section.

4. Research Relevant Planning Topics and Develop Training and Development Program Based on Needs of Membership

4a. Survey membership to identify relevant topics as a basis for education and training programs.

4b. Communicate and discuss relevant topics with Sections and committees for development of chapter-wide priorities for training and education.

4c. Communicate chapter training priorities for consideration as bases for member training and development.
4d. Develop specific topics of relevance for training and development needs within each Section as needed and if different from Chapter-wide needs.

4e. Schedule workshops and training sessions so that they are geographically accessible to members in all parts of the state.

4f. Utilized website and newsletter as information resources for education and training of members and interested partners.

4g. Develop a chapter awards category to recognize best practices related to topical planning issues.

4h. Identify organizations that share an interest in topical planning issues. Partner with these organizations to expand chapter outreach and to leverage resources.

4i. Recruit subject matter experts to write articles, develop training, and otherwise communicate with members about topics of timely relevance.
IX. Action Plan and Schedule

The Chapter will implement these strategies over the next four years by prioritizing tasks and assigning responsibilities to directors, members, Sections, and committees. The specifics of implementation for the strategies are described below. Implementation tasks will be assigned, and work will begin as early as November/December 2018.
<table>
<thead>
<tr>
<th>Develop the Organization to Ensure Implementation of the Development Plan</th>
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<tbody>
<tr>
<td><strong>Action (Specific task or step)</strong></td>
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<tr>
<td>1. Develop an annual work program based upon prioritized action steps and a realistic assessment of what is achievable within available resources</td>
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<tr>
<td>2. Develop the annual budget to support and implement the development plan</td>
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<td>3. Assign implementation actions/tasks to appropriate individual, committee, or Section and obtain commitment to task by assigned responsible party</td>
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<td>4. Review bylaws for best practice, clarity, and functions, roles and responsibilities of officers, board of directors, component Sections, committees and chairs. Revise as necessary.</td>
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| **11. Utilize annual membership meeting at conference to communicate plan implementation and chapter progress/status** | **Lead:** President  
Support: Staff | **Q4** | **Research, compilation of reports, data on membership, and finances** |
| **12. Review role of the Education Committee and establish clear service delivery functions to planning students/faculty/universities as anticipated by the bylaws** | **Lead:** Education Committee Chair;  
Immediate Past President; Secretary | **Q3 2019** | **Email, teleconferencing** |
| **13. Identify talented individuals within chapter membership for projects, service delivery assignments, and leadership development** | **Lead:** Chapter officers, board of directors, committee chair, Section chair, staff | **Ongoing** | **Email, teleconferencing** |
| **14. Develop a chapter leadership succession plan to ensure continuity and development plan implementation** | **Lead:** Vice-president, Immediate Past-president  
Support: Executive committee; staff | **Q3 2019** | **Teleconference, email, meeting space/time** |
<table>
<thead>
<tr>
<th>Action (Specific task or step)</th>
<th>Responsible Parties (Lead/Support Roles)</th>
<th>Timing</th>
<th>Resources Needed (Est. cost, means of finance, time, etc.)</th>
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<tbody>
<tr>
<td>1. Connect planning students and faculty to chapter membership opportunities and services in a timely manner prior to beginning of academic year</td>
<td>Lead: Chair of education committee; Support: Chair of Membership and Communication Committee</td>
<td>Q3 2020</td>
<td>Email, chapter branded letterhead etc. / List of points of contacts at schools, including faculty liaison</td>
</tr>
<tr>
<td>2. Participate in Job fairs and other, similar outreach opportunities</td>
<td>Lead: Membership and Communication Committee chairs</td>
<td>Q2 2020</td>
<td>List of job fairs, email, meeting space</td>
</tr>
<tr>
<td>3. Contact by Section leadership to new members with a personal call or email/ introductions to Section members and services within 3 months of member enrollment</td>
<td>Lead: Section Chair Support: Membership and Communication Committee Chairs, Section Chairs</td>
<td>Q2 2021</td>
<td>New member roster, email, telephone</td>
</tr>
<tr>
<td>4. Develop a standardized new member and planning student outreach system and information packet</td>
<td>Lead: Membership and Communication Committee Chair, Education Committee Chair Support:</td>
<td>Q2 2019</td>
<td>RESOURCES??</td>
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</table>
**Restart and Reinvigorate the Legislative Committee**

<table>
<thead>
<tr>
<th>Action (Specific task or step)</th>
<th>Responsible Parties (Lead/Support Roles)</th>
<th>Timing</th>
<th>Resources Needed (Est. cost, means of finance, time, etc.)</th>
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</table>
| 1. Recruit members and committee leaders who will actively participate in a working committee, often as a Lead on a specific aspect of the committee’s work (e.g. Advocacy, Evaluation, Issue Expert, etc....) | Lead: Committee Chair  
Support: Committee membership, President, APA-PA Board and Section leadership. Develop specific committee liaisons for each Section. | Q4 2018    | Time to recruit and organize. Active engagement from Board and Section leadership to recruit members. Collaboration needed with municipal associations and other affiliated groups.                                                                                     |
| 2. Develop realistic committee objectives for short and long-term. Objectives MUST be realistic within available resource constraints. | Lead: Committee membership  
Support: President and Vice President                                                                 | Q1 2019    | Clear objectives from Board. Committee work planning session scheduled for November 2018.                                                                                                                                                                          |
| 3. Identify and contract with legislative tracking resources to provide notification on relevant legislation. | Lead: Committee Chair and Issue Experts, tracking to be provided by a contracted source.            | Q3/Q4 for association research 2018 | Chair will contact municipal associations re: legislative tracking. Funds likely needed in support of a partnership with an association or to pay another entity to monitor.                                                                                     |
| 4. Develop a network of planning experts to evaluate legislative and policy matters and make recommendation | Lead; Committee membership as assigned by chair                                                    | Q1/Q2 for issue expert ID 2019 | Chair and membership                                                                                                                                                                                                                                            |
5. Solicit constructive ideas and input from APA-PA membership for issues requiring legislative advocacy.

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<thead>
<tr>
<th>Action (Specific task or step)</th>
<th>Responsible Parties (Lead/Support Roles)</th>
<th>Timing</th>
<th>Resources Needed (Est. cost, means of finance, time, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Develop a survey for membership to identify topics and emergent issues of relevance to the board.</td>
<td>Lead: Professional Development Committee Chair, Planning Official Development Committee</td>
<td>Q2 2019</td>
<td>Email, survey teleconferencing, meeting space</td>
</tr>
</tbody>
</table>
| 5. Solicit constructive ideas and input from APA-PA membership for issues requiring legislative advocacy. | Lead: Committee membership (Advocacy Lead)  
| 6. Develop outreach with legislators and agency leadership. Provide opportunities for APA-PA membership to directly advocate for legislation | Lead: Committee membership (Advocacy Lead)  
Support: Staff for scheduling and setting up meetings/breakfasts. | Q3 2019 / Q1 2020 for leg. breakfasts & indiv./regional outreach (after survey results) | Build network through Sections to connect planners directly with legislators (need member file in excel). Funds for legislative breakfasts. Outreach resources. |
<table>
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<tr>
<th>Task</th>
<th>Leader and Support</th>
<th>Timeline</th>
<th>Resources</th>
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</thead>
<tbody>
<tr>
<td>planners, planning students, and planning officials for training and education</td>
<td>Chair Education Committee Chair, Support: Secretary; staff</td>
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<tr>
<td>2. Prioritize survey results</td>
<td>Lead: Professional Development Committee Chair, Planning Official Development Committee Chair, Education Committee Chair, Support: Staff</td>
<td>Q4 2019</td>
<td>Meeting space, email, teleconference</td>
</tr>
<tr>
<td>3. Dissemination of results to all committees/Sections/conference committee as chapter-wide areas of focus</td>
<td>Lead: Staff, Support: Committee chairs, Section chairs</td>
<td>Q3 2020</td>
<td>Meeting space, teleconference</td>
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<tr>
<td>4. Develop and schedule geographically accessible workshops on subjects of chapter-wide areas of focus</td>
<td>Lead: Section chairs, Support: Education Committee, Planning Officials Development Committee, and Professional Development Committees Chairs</td>
<td>Q1 2021</td>
<td>Funding through grants and partnerships</td>
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<td>5. Research the need for Section-specific topics to be shared for locally focused training and education/develop training</td>
<td>Lead: Section chairs</td>
<td>Q3 2021</td>
<td>Funding through grants and partnerships</td>
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<td>as needed</td>
<td>Lead: Membership and Communications Committee Chairs: Support: Professional Development, and Planning Officials Development Committee Chairs, staff</td>
<td>Q1 2021</td>
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<td>6.</td>
<td>Develop website resources and Vantage Point articles to deliver topical subject matter</td>
<td>lead: Membership and Communications Committee Chairs: Support: Professional Development, and Planning Officials Development Committee Chairs, staff</td>
<td>Q1 2021</td>
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<td>7.</td>
<td>Develop an annual award category for projects that exemplify planning for a topical issue</td>
<td>Lead: Annual Award Committees chair</td>
<td>Q1 2020</td>
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<td>8.</td>
<td>Identify partner organizations that share interest in topical issues and education</td>
<td>Lead: President Support: Vice-president, Secretary, Treasurer, staff</td>
<td>Q1 2020</td>
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<td>9.</td>
<td>Solicit articles of topical interest for inclusion in newsletter and website from subject matter experts</td>
<td>Lead: Membership and Communications Committee Chairs Support: Staff</td>
<td>Q2 2020</td>
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<td>10.</td>
<td>Review APA’s new website “APA Learn” for use as an education program delivery resource for use by the Chapter</td>
<td>Lead: Professional Development Committee Chair Support: Membership and Communications Committee Chair, staff</td>
<td>Q1 2020</td>
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Pennsylvania Chapter

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