
2019 – 2022

APA Pennsylvania
Chapter Development Plan
"Promoting a Culture of Planning"



American Planning Association
Pennsylvania Chapter

Making Great Communities Happen

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

Table of Contents

I.	Acknowledgements	
II.	Introduction and Background	<i>page 5</i>
III.	Mission	<i>page 6</i>
IV.	Vision	<i>page 6</i>
IV.	Values	<i>page 6</i>
V.	Organizational Narrative	<i>page 7</i>
VI.	Organizational Priorities	<i>page 9</i>
VII.	Strategies	<i>page 10</i>
VIII.	Action Plan and Schedule	<i>page 15</i>

I. Acknowledgements

Board of Directors

Executive Committee

James Cowhey, AICP, *President*
Amy McKinney, *Vice President, Northwest Section*
Leah Eppinger, AICP, *Secretary*
Justin Dula, AICP, *Treasurer, Southeast Section*
Brian O'Leary, AICP, *Past President*
Rachelle Abbott, AICP, *Central Section*
Sara Pandl, AICP, RLA, *Lehigh/Valley Section*
Katie Stringent, *Southwest Section*
Peter Wulfhorst, AICP, *Northeast Section*

Directors

Alexis Williams, AICP
Troy Truax, AICP
Ed LeClear, AICP
David McFarland III, AICP
Amy Evans, AICP
Rachelle Abbot, AICP
Pam Shellenberger, AICP
Scott Haverstick
Sara Pandl, AICP, RLA
Tina Roseberry, AICP
Amanda Raudenbush
Nathaniel Staruch
Cindy Campbell

Jack Lynch
William McLain
Catherine Reynolds
Zach Hammaker

Development Plan Participants

Facilitator: Denny Puko
Shermer & Associates: Susan Shermer,
Kim Gusic, Christine Stewart
Rachelle Abbott, AICP
Rich Bickel, FAICP
Michelle Brummer, AICP
Jeff Doshna, PhD, AICP
Justin Dula, AICP
Leah Eppinger, AICP
Amy Evans, AICP
Tara Hitchens, AICP
Ed LeClear, AICP
Stan Lembeck, PhD, AICP
Betsy Logan, AICP
David McFarland, AICP

Amy McKinney
Brian O'Leary, AICP
Sara Pandl, AICP, RLA
Tina Roseberry, AICP
Pam Shellenberger, AICP
Herman Slaybaugh
Katie Stringent
Troy Truax, AICP
Jerry Walls, FAICP
Alexis Williams, AICP, PP
Peter Wulfhorst, AICP

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 1272 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.

Develop the Organization to Ensure Implementation of the Development Plan			
Action (Specific task or step)	Responsible Parties (Lead/Support Roles)	Timing	Resources Needed (Est. cost, means of finance, time, etc.)
1. Develop an annual work program based upon prioritized action steps and a realistic assessment of what is achievable within available resources	Lead: President, Vice-president, Secretary Support: staff	Q4 2018	Meeting space, task assessment, teleconferencing
2. Develop the annual budget to support and implement the development plan	Lead: Treasurer, staff Support: President	Q4 2018	Teleconferencing, meeting space, email
3. Assign implementation actions/tasks to appropriate individual, committee, or Section and obtain commitment to task by assigned responsible party	Lead: President, Vice-president, Section chairs, committee chairs Support: Board of Directors	Q1 2019	Tele-conferencing, meeting space; email
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.	Lead: Secretary, Immediate Past President Support: Staff	Q2 2019	Teleconferencing, email, meeting space

5. Clearly communicate the duties, functions, and tasks of the Sections and committees as set out in the bylaws as revised	Lead: President, Board of Directors Support: Membership and Communications Committee, staff	TIMING	RESOURCES
6. Develop a Section and Committee reporting form that aligns with the Development Plan actions	Lead: Secretary, Staff	Q1 2019	Email and website distribution (this could be done on Google Drive)
7. Sections / Committees report quarterly to board on implementation progress using standard report form	Lead: Section and Committee Chairs Support: Secretary, staff	Q3 2019	Email distribution
8. Continually review implementation progress and update annual work program	Lead: President, Vice-president Support: Executive Committee/Board of Directors, staff	Ongoing	Email, tele-conferencing, meeting space, Section and committee reports; standing item on board meeting agenda, president's address at annual membership meeting
9. Develop a Corrective Action Plan form to be used when needed to address lack of progress by responsible party in implementing Strategic Plan actions	Lead: Secretary Support: Treasurer, Section/Committee chairs, staff	Q2 2019	Email, tele-conference, meeting space
10. Communicate Strategic Plan progress to membership	Lead: President Support: Vice-President, Section chairs, committee	Q1,2,3,4	Email, tele-conferencing, meeting space, Vantage Point, e-news, website, annual membership meeting

	chairs, staff		
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

Orient and "Onboard" New Members and Planning Students to Chapter Benefits and Services			
Action (Specific task or step)	Responsible Parties (Lead/Support Roles)	Timing	Resources Needed (Est. cost, means of finance, time, etc.)
1. Connect planning students and faculty to chapter membership opportunities and services in a timely manner prior to beginning of academic year	Lead: Chair of education committee; Support: Chair of Membership and Communication Committee	Q3 2020	Email, chapter branded letterhead etc. / List of points of contacts at schools, including faculty liaison
2. Participate in Job fairs and other, similar outreach opportunities	Lead: Membership and Communication Committee chairs	Q2 2020	List of job fairs, email, meeting space
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	Lead: Section Chair Support: Membership and Communication Committee Chairs, Section Chairs	Q2 2021	New member roster, email, telephone
4. Develop a standardized new member and planning student outreach system and information packet	Lead: Membership and Communication Committee Chair, Education Committee Chair Support:	Q2 2019	RESOURCES??

Restart and Reinvigorate the Legislative Committee

Action (Specific task or step)	Responsible Parties (Lead/Support Roles)	Timing	Resources Needed (Est. cost, means of finance, time, etc.)
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

to the board.			
5. Solicit constructive ideas and input from APA-PA membership for issues requiring legislative advocacy.	Lead: Committee membership (Advocacy Lead) Support: Staff to distribute web survey to membership.	Q4 2018 for survey launch to Q3 2019 for finalizing issues & 2019 conference push (Reading)	Method and resources for campaign development, survey distribution and advertising. Initial "Call for Issues & Membership" launched in advance of 2018 annual conference.
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.

Research/Educate/Communicate on Relevant Topics			
Action (Specific task or step)	Responsible Parties (Lead/Support Roles)	Timing	Resources Needed (Est. cost, means of finance, time, etc.)
1. Develop a survey for membership to identify topics and emergent issues of relevance to	Lead: Professional Development Committee Chair, Planning Official Development Committee	Q2 2019	Email, survey teleconferencing, meeting space

planners, planning students, and planning officials for training and education	Chair Education Committee Chair, Support: Secretary; staff		
2.Prioritize survey results	Lead: Professional Development Committee Chair, Planning Official Development Committee Chair, Education Committee Chair Support: Staff	Q4 2019	Meeting space, email, teleconference
3.Dissemination of results to all committees/ Sections/conference committee as chapter-wide areas of focus	Lead: Staff Support: Committee chairs, Section chairs	Q3 2020	Meeting space, teleconference
4.Develop and schedule geographically accessible workshops on subjects of chapter-wide areas of focus	Lead: Section chairs, Support: Education Committee, Planning Officials Development Committee, and Professional Development Committees Chairs	Q1 2021	Funding through grants and partnerships
5.Research the need for Section- specific topics to be shared for locally focused training and education/develop training	Lead: Section chairs	Q3 2021	Funding through grants and partnerships

as needed			
6. Develop website resources and Vantage Point articles to deliver topical subject matter	Lead: Membership and Communications Committee Chairs: Support: Professional Development, and Planning Officials Development Committee Chairs, staff	Q1 2021	Membership and staff support
7. Develop an annual award category for projects that exemplify planning for a topical issue	Lead: Annual Award Committees chair	Q1 2020	Teleconferencing, meeting space, email
8. Identify partner organizations that share interest in topical issues and education	Lead: President Support: Vice-president, Secretary, Treasurer, staff	Q1 2020	Lists of organizations, email
9. Solicit articles of topical interest for inclusion in newsletter and website from subject matter experts	Lead: Membership and Communications Committee Chairs Support: Staff	Q2 2020	Membership, email
10. Review APA's new website "APA Learn" for use as an education program delivery resource for use by the Chapter	Lead: Professional Development Committee Chair Support: Membership and Communications Committee Chair, staff	Q1 2020	APA website, email, membership



American Planning Association
Pennsylvania Chapter

Making Great Communities Happen

587 James Drive

Harrisburg, PA 17112-2273

717.671.4510 T

717.545.9247 F

info@planningpa.org

www.planningpa.org