APA-MA 2020 – 2021 Bridge Strategic Plan



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Introduction

As APA-MA's current strategic plan expires and with the onset of the COVID-19 pandemic, the Board took a different approach to creating a new plan. Instead of a traditional 3- to 5- year plan timeframe, the APA-MA's Strategic Plan Committee recommended that the organization create an interim, short-term strategic plan with a maximum 1-year focus. To create this interim plan, the Strategic Plan Committee organized six regional focus groups that were held in August to determine what is important to our members and how the organization can best serve them during these unprecedented times. The feedback was synthesized and discussed at the APA-MA Annual Board Retreat in September. The outcome was a short-term set of strategies presented to the members for adoption at the APA-MA Annual Meeting in December.

We appreciate all who participated, assisted with facilitation, and assembled notes. Special thanks to Becky Edelman for putting together the "Report Out" summary of all the notes gathered from the Annual Retreat. It made this document possible.

Scope of Work

Due to the COVID-19 pandemic, the following document reflects a oneyear bridge strategy that is based on our true capacity to realistically accomplish actions that advance the mission of the APA-MA Chapter. Our 2017-2020 Strategic Plan will continue to exist, hence bridging that Strategy with a longer-term Strategy (3-5 years) which will be developed in late 2021. The organizing structure for this bridge strategy is the same as the 2017-2020 Strategic Plan to ensure consistency. We maintained the four categories: *Member Services & Professional Development, Advocacy & Outreach, Resources,* and *Chapter Administration.* Each of the four categories contains **topics** with related actions. Each action includes **responsible parties, priority/effort** needed, and **timeframe** for implementing each action.



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In addition to new actions to achieve the bridge strategy, the APA-MA updated our Mission Statement to truly reflect the evolution in how we communicate and implement our work as a Chapter.

Even with this bridge strategy, the APA-MA Board will continue to implement actions from the 2017-2020 Strategic Plan that benefit the organization long-term. However, this bridge strategy is intended to help us stay focused on helping our communities (and the planners that serve them) recover and bounce forward from the pandemic over the next year.

Mission Statement Update:

Amend the Mission Statement to include the words "and support" and "in a manner that maximizes diversity, equity, and inclusion" to read:

The mission of the Massachusetts Chapter of the American Planning Association is to enhance **and support** planning in Massachusetts through education, advocacy, outreach, communication, and provision of services & resources to members and the larger planning community, **in a manner that maximizes diversity, equity, and inclusion**.

Торіс	Actions	Responsibility	Priority/ Effort	Timeframe
Membership	Create a membership directory so Planners can communicate with each other within their region.	Secretary, Chapter Administrator, Regional Representatives	High	Early 2021
Professional Development	Support planning for the National APA Conference in May 2021	President, Chapter Administrator, Local Host Committee, Treasurer	High	Through June 2021
	Create programs and share information on best practices that have come out of the pandemic (for example, virtual tools, equitable engagement)	Chapter Committees and Regional Representatives, Other Board Volunteers	Medium	All Year
	Develop webinars/trainings on how the pandemic has been or could affect planning going forward (for example on schools planning, outdoor dining permits, etc.)	Chapter Committees, Regional Representatives, PDO	Medium	All Year
	Provide regular opportunities (through articles, promotion of new tools on social media/ website, webinars, etc.) to upskill planners.	Chapter Committees, Regional Representatives, PDO	Medium	All Year
Communications	Create and distribute regular regional newsletters	Regional Representatives, Chapter Administrator	High	Quarterly
Social Events and Networking	Continue the virtual Planner's Therapy sessions. Work on reformatting and refreshing the "event" as needed.	Social Events Coordinator	Low	Monthly

Member Services and Professional Development

Торіс	Actions	Responsibility	Priority/ Effort	Timeframe
Reframe the Voice of Planning	Partner with professional organizations to emphasize and promote the importance of planning. (Example types of orgs: architecture, civil engineering, landscape architecture). Take direction from APA National	President, Vice President, PDO, Legislative and Policy Committee	High	All Year
	Communicate the importance of local and regional planners, especially in light of COVID	President, Vice President, PDO, Legislative and Policy Director	Medium	All Year
	Advocate for additional resources for planning at all levels. Share knowledge and best practices for ways to leverage available resources.	Executive Committee, Legislative and Policy Committee	Medium	All Year
Current Legislation	Continue working with the Legislative Strategist, including finding a sustainable revenue source to pay for their services	Legislative and Policy Director, President, Chapter Administrator, Treasurer	Medium	All Year, with revenue piece by end of 2020/early 2021
	Communicate current legislation to Planners	Legislative and Policy Director, President, Chapter Administrator	Medium	Bi-monthly
	Focus on state and local budgets as it affects planning and planners	Legislative and Policy Director, Committees?	Low	All Year

Resources

Торіс	Actions	Responsibility	Priority/ Effort	Timeframe
Land Use Guidebook	Promote availability and support distribution of the Land Use Guidebook	Chapter Administrator, Treasurer, Social Law Library	High/Medium	Late 2020/Early 2021/All Year

Chapter Administration

Торіс	Actions	Responsibility	Priority/ Effort	Timeframe
Chapter Budget	Diversify revenue stream to create a sustainable chapter budget that makes up lost revenue from reduced membership	President, Treasurer, Chapter Administrator	High	End of 2020/Early 2021

Massachusetts Chapter of the American Planning Association

Strategic Plan – 2017 to 2020

Adopted: 13 October 2017

INTRODUCTION

The Massachusetts Chapter of the American Planning Association (APA-MA) is one of forty-seven Chapters and twenty-one Divisions of APA. Both APA and the Massachusetts Chapter are organized to represent and support the members of the organization as well as the larger community of professional and citizen planners. APA, its professional institute, the American Institute of Certified Planners, and the Massachusetts Chapter support advances in the art and science of planning in order to assist the creation and development of great American communities. The organizations encourage excellence in planning that contributes to improvements in the quality of life for all Americans.

As part of its Mission, the Massachusetts Chapter develops a Strategic Plan every three to five years. The purpose of the Strategic Plan is to create a program of action for the Chapter to pursue in support of planning in Massachusetts.

The action items detailed in this plan are intended to implement the Chapter's strategies in each of following areas of responsibility:

Member Services & Professional Development	Advocacy & Outreach
Resources	Chapter Administration

The Priorities listed in the Plan are categorized are as follows: High, Medium, Low The Timelines listed in the Plan are as follows: Ongoing; < 6 months; 6-12 months; 12-24 months; 24 -36 months

MISSION STATEMENT

The mission of the Massachusetts Chapter of the American Planning Association is to enhance planning in Massachusetts through education, advocacy, outreach, communication, and provision of services & resources to members and the larger planning community.

MISSION GOALS

The goals of the Chapter are to:

- > To promote the public good through the application of planning for better decision-making;
- To assist in meeting the needs of residents and citizens in a manner that enhances the quality and distribution of resources in the physical, social, and economic environment;
- To advocate for open, informed, transparent, and inclusive public processes for residents, citizens and local officials to make the best decisions for the future of their communities;
- > To advance the art and science of planning and promote the value of planning within Massachusetts; and
- > To provide services and resources to meet the needs of the planning community.

	MEMBER SERVICES & PRO	FESSIONAL DEVELOPN	1ENT	
Торіс	Actions	Responsibility	Priority	Timeline
1.1 - Collaboration with	Work with Connecticut and Rhode Island	SNEAPA Chair, Chapter	Medium	6-12 months
nearby APA Chapters	Chapters to improve administration of	President, Vice President,		
	SNEAPA. Notify adjoining chapters about	Professional Development		
	conferences and events held by the MA	Officer		
	Chapter. Coordinate with NNECAPA			
1.2 - Professional	Review the AICP Prep Course annually	PDO	Medium	6-12 months
Development	• Improve functionality and increase publicity	Secretary, Webmaster,	High	< 6 months
	of events, jobs, and RFP postings	Chapter Administrator		
	• Develop special programs on specific topics	Primarily Committees and	Medium	6-12 months
	with at least one half-day workshop per	Regional Representatives,		
	year	Other Board Volunteers		
	Expand distribution and knowledge of	Secretary, PDO, Webmaster,	High	< 6 months
	webinar series (Chapter Division Webinar	Chapter Administrator		Ongoing
	Series and APA National Webinar Series)			
	Hold at least one regional event per year	Regional Representatives	High	Ongoing
	Create a webinar for the Chapter Division	PDO	Low	6-12 months
	Webinar Series			Ongoing
	• Explore the creation of a scholarship for	YPG, Treasurer	Medium	6-12 months
	APA events or internship program for			
	students and/or emerging planners			

	MEMBER SERVICES & PRO	FESSIONAL DEVELOPM	ENT	
Торіс	Actions	Responsibility	Priority	Timeline
	 Create a FAICP Task Force every two years to reach out to eligible members, assist those who wish to pursue nominations and publicize members selected for induction into College of Fellows 	Executive Committee, Current FAICP Members	Medium	Ongoing
	 Provide yearly sessions on Ethics and Law, in addition to SNEAPA 	PDO, Legislative and Policy Officer	Medium	6-12 months Ongoing
	 Apply for Chapter President Council grants, and other grants, that would provide resources to the Chapter for initiatives such as guidebooks, training, planning projects, research studies, etc. 	President	Medium	Ongoing
1.3 - Social Events and Networking	Actively recruit nominees for the Annual Awards	Awards Committee	Medium	6 months Ongoing
	 Hold an event to recognize Chapter members newly inducted into FAICP. 	President, Chapter FAICP Ad Hoc Committee	Medium	Every 2 years
	Publicize and promote the Annual Awards Lunch and award winners	Awards Committee, Chapter Administrator	High	6-12 months Ongoing
	Restart the Meet Mass event	Ad-Hoc Committee or Board Volunteer	Low	12-24 months
	 Continue to expand and support YPG programming 	YPG, All Members	Medium	Ongoing
	Continue the Planners Movies and Meetup Series	Ad-Hoc Committee or Board Volunteer	Low	Ongoing
	 Participate in planning and actively advertise the New England or Region 1 Reception at the National Planning Conference 	President	High	12-24 months Ongoing
1.4 - Communications	• Expand the newsletter into a professional publication that is distributed on a regular basis	Newsletter Editor	High	6-12 months
	 Provide a monthly digest of events and upcoming opportunities 	All Members, Chapter Administrator	High	< 6 months

	MEMBER SERVICES & PRO	FESSIONAL DEVELOPM	ENT	
Торіс	Actions	Responsibility	Priority	Timeline
	 Hire a website developer, and/or investigate APA services, to create a new website with improved functionality and design 	Webmaster, Secretary, Chapter Administrator	High	6-12 months
	 Provide a public calendar on the website that includes all APA-MA events and CM opportunities 	Webmaster, Chapter Administrator	Medium	6-12 months
	 Produce a Chapter Annual Report, that includes the Chapter's annual financial report, to be distributed at Annual meeting at SNEAPA, posted on website, included in newsletter, and sent to APA National 	Executive Committee	Medium	6-12 months
1.5 - Membership	Clearly articulate the value of APA-MA membership	All Members	High	< 6 months Ongoing
	 Survey members to identify why they are APA-MA members, which service(s) are most beneficial to members, and what additional service(s) or events they would value 	Executive Committee	High	< 6 months Every 24-36 months
	 Develop promotional materials that explain what APA-MA is and what the organization does 	Secretary, Chapter Administrator	Medium	6-12 months
	 Hold a productive and well-led Annual Meeting at SNEAPA 	President, Executive Committee, Chapter Administrator	High	< 6 months
	Create a welcome packet of materials for new members	Executive Committee, Communications Committee	Low	12-24 months
1.6 – University Planning Programs	 Create an University Liaison position to serve as the primary contact for schools, keep the Board informed of university activities, and build the relationship between the Chapter and university 	President	High	<6 months

	MEMBER SERVICES & PRO			
Topic	Actions Develop and maintain a list of colleges and universities offering planning degree and certificate programs	Responsibility PDO, YPG, University Liaison	Priority Medium	Timeline 6-12 months
	 Reach out to schools with planning programs to provide information on member services to students 	President, PDO, University Liaison	Medium	12-24 months
	Hold lunch events at the PAB-accredited schools	Executive Committee, University Liaison	Medium	12-24 months
	Offer a mentoring program	Executive Committee	Medium	12-24 months
	Organize a panel of young professionals for events at the planning schools to discuss career topics	YPG, University Liaison	Medium	12-24 months
	• Work with the 4 accredited planning schools in organizing the annual 4P Lecture series	President, University Liaison	High	6-12 months
	 Participate in the Planning Accreditation Board accreditation reviews of Harvard, UMass- Amherst, Tufts and MIT 	President, Ad Hoc PAB review Committee, University Liaison	High	Every 3-5 years

ADVOCACY & OUTREACH						
Торіс	Topic Actions Responsibility Priority Timeline					
2.1 - Advocate for Excellence in Planning at	 Define relationship of Chapter to MAPD, MACP, CPTC, and other allied organizations. 	Executive Committee, Organizational Liaisons	Medium	12-24 months		

	ADVOCACY &	& OUTREACH		
Торіс	Actions	Responsibility	Priority	Timeline
the State and Local Level	 Strengthen existing partnerships with allied organizations (Smart Growth Alliance, MMLA, MMA, DHCD, EOHED, MARPA, NCDA, etc.) 	Board Liaisons, All Members	Medium	Ongoing
	 Work with the Smart Growth Alliance and others to develop material explaining the proposed changes to Chapter 40A and other state laws and regulations 	Legislative Officer, Legislative Committee	High	< 6 months
	 Track legislative changes related to planning and zoning and provide comment to the Legislature as appropriate 	Legislative Officer	High	Ongoing
	Review and take positions on draft APA Policy Guides. Transmit that position to Chapter Delegates Assembly	Chapter Delegates	Low	Ongoing
2.2 Engage in APA Legislative and Policy	Become involved in the APA Advocacy Network	President, Legislative and Policy Officer	Medium	Ongoing
Initiatives	 Review and take positions on draft APA Policy Guides. Transmit that position to Chapter delegates for National Planning Conference. 	President, Chapter Board	Medium	Ongoing
	Participate in the Fall APA Legislative and Policy Conference	President, Legislative and Policy Officer	Medium	6-12 months
2.3 - Engage in Legislative Process for Comprehensive Zoning Reform	 Actively engage with our allied organizations to advocate and lobby for comprehensive zoning reform and other good planning practices 	President, Legislative Officer, Board Liaisons	High	< 6 months Ongoing

ADVOCACY & OUTREACH				
Торіс	Actions	Responsibility	Priority	Timeline
2.4 - Increase and Improve Outreach Efforts	 Better publicize the existence of the APA- MA Annual Awards and actively publicize & promote award winners 	Regional Representatives, Awards Committee	Medium	< 6 months Ongoing
	 Publicize and work with communities in applying for APA Great Places/Neighborhoods/Streets Program 	Awards Committee	Medium	6-12 months Ongoing
	• Promote other public events that highlight the benefit of good planning	Social Media Coordinator, Executive Committee, All Members	High	6-12 months Ongoing
	 Create a Great Places MA Program, coordinate with Smart Growth Alliance's program, or create a tri-state great places program to be announced at SNEAPA 	Executive Committee, Awards Committee	Low	12-24 months
	Develop an effective brochure to promote APA-MA	Secretary	Medium	6-12 months
	Improve use of social media and other communications tools	Social Media Coordinator, Chapter Administrator, Executive Committee	Medium	< 6 months Ongoing
	 Develop a communications strategy by appointing a Communications Committee. Explore hiring a communications firm or person 	President	Medium	12-24 months
	 Identify and build relationships with related organizations and/or organizations with similar goals (AARP Livable Communities and others working on topics such as smart growth, livable communities, aging in place, walkability, etc.) 	Executive Committee, Committees	Medium	12-24 months
	 Plan for and celebrate Community Planning Month each October and Community Development week each April 	Executive Committee, Committees, Regional Representatives	Medium	6-12 months

RESOURCES				
Торіс	Actions	Responsibility	Priority	Timeline
3.1 - Expand Public Education	• Work with allied organizations and others to create materials and host public events	Committees, Executive Committee, Regional Representatives	Medium	6-12 months
	Publicize adopted APA policy guides to members, cities and towns, legislators, etc.	Executive Committee, Legislative Officer, Chapter Delegates	Low	Ongoing
	• Educate members and the public about legislative matters including zoning reform	Legislative Officer, Regional Representatives	High	Ongoing
	 Investigate strategies to reach out to planning and zoning board members to join the Chapter 	Executive Committee	Low	12-24 months
	• Decide if we want to provide education and other resources to Planning Boards and other local officials, such as the APA <i>Commissioner</i> publication.	Regional Representatives, Committees, Special Task Force	Medium	12-24 months
3.2 - Provide a Library of Planning Resources	 Prepare guidebooks and/or issue RFPs for the production of guidebooks and other publications to promote good planning practice 	Executive Committee, Committees	Low	24-36 months
	 Publicize and widely share materials created by APA National and other organizations. Debrief after events and publicize in newsletter 	President	Medium	Ongoing
	 Provide a Library of photos of excellent design examples on the website. Link to APA website and other chapters 	All members	low	12-24 months

CHAPTER ADMINISTRATION				
Торіс	Actions	Responsibility	Priority	Timeline
4.1 - Explore Options for Changing the Chapter Administrative Structure	 Review management structures of other APA Chapters and similar organizations and develop a proposal recommending a structure for Board review and decision 	President, Vice President, Treasurer	High	< 6 months
	• Define responsibilities for staff and prepare an RFP or RFQ to implement the recommended structure	President, Vice President, Treasurer	High	< 6 months
4.2 - Improve Meeting Logistics	 Review and prepare recommendations for changing the meeting format and schedule 	President, Vice President, Secretary	High	< 6 months
	 Create and adhere to a standard timeline and process for agenda setting 	President, Secretary, Chapter Administrator	High	< 6 months Ongoing
	 Schedule meetings and identify locations annually 	Secretary, Chapter Administrator	High	< 6 months Ongoing
	 Review meeting location, type, and frequency to improve attendance and participation (alternate day / time, monthly conference calls with quarterly in-person meetings, or other structure – for example) and implement findings 	Executive Committee	Medium	6-12 months
	 Provide previous meeting minutes to Board members prior to Board meetings Provide follow-up "to do" list from Board meeting decisions to Board members. 	Secretary, Chapter Administrator	High	< 1 month ongoing
	 Consider an in-person joint APA-MA / MAPD board meeting each year 	Executive Committee	Low	12-24 months
4.3 - Internal Communications	 Create board email aliases (<u>board@apa-ma.org</u> and <u>exec@apa-ma.org</u>) to simplify internal communication 	Secretary, Chapter Administrator	High	< 6 months
	• Develop an internal board calendar that includes meetings, events, and deadlines for specific tasks	Chapter Administrator, President, Secretary	High	< 6 months ongoing

CHAPTER ADMINISTRATION				
Торіс	Actions	Responsibility	Priority	Timeline
	 Establish policy regarding who is responsible for Chapter website, Facebook page, Twitter account, Constant Contact account, etc. and who has password access social media 	Executive Committee	Medium	6-12 months
	 Distribute draft minutes within a week following each Board meeting and again with the agenda for the next meeting. Circulate a tasks and votes list immediately following meetings 	Secretary	High	6-12 months
4.4 - Financial Management	• Prepare an annual or biannual budget that is consistent with the current strategic plan	Treasurer, Executive Committee	High	< 6 months
	 Publicize budget to members in Newsletter, on website and presentation at Annual Meeting 	President, Treasurer	High	Ongoing
	Annually file IRS Form 990 and any other required federal or State forms	President, Treasurer	High	Ongoing
	 Establish protocols for a "back-up" Treasurer. 	President, Treasurer	Medium	6-12 months
4.5 - Board Organization and Membership	 Prepare written descriptions of each position and committee including ad-hoc committees to define roles, responsibilities, and expectations. Descriptions should reflect the Strategic Plan 	All Members	High	< 6 months
	Review committee and position descriptions annually	All Members	Low	Ongoing
	 Prepare a task list for new volunteers so the Chapter has specific needs and ideas in place when people volunteer to help and publicize this list. 	Secretary, Chapter Administrator	High	< 6 months
	Establish a PDO Committee	Executive Committee, PDO	High	6-12 months
	Review and revise Strategic Plan annually	President, Vice President, Strategic Plan Committee	Medium	Ongoing

	CHAPTER ADM	1INISTRATION		
Торіс	Actions	Responsibility	Priority	Timeline
4.6 - Bylaws	 Create ad-hoc committee to update and revise Bylaws and Regulations to reflect Strategic Plan priorities 	Bylaws Committee	Medium	< 6 months
4.7 - Provide Board Training and Develop Organizational Skills	 Create an orientation program for new members and members moving into new positions 	Executive Committee, Ad-Hoc Training Committee	High	< 6 months
4.8 - Elections	Join APA National Election Cycle	Executive Committee, Nominating Committee	High	6-12 months
	• Create a Nominating Committee for elected positions, to help recruit new board members, prepare current board members for new positions, and serve as a resource	Executive Committee	High	12-24 months
	 Ensure that that nominating committee reviews the board roles, responsibilities, and expectations with each potential candidate 	President, Nominating Committee	Medium	12-24 months
	Establish guidelines for the Nominating Committee	Executive Committee, Nominating Committee	Medium	12-24 months
	Develop a succession plan	Nominating Committee	Medium	12-24 months
4.9 - Develop a plan for administering the Guidebook to Massachusetts Land Use Planning	 Create a specific email address on the website for people to submit questions, concerns, errors etc. (<u>Guidebook@apa- ma.org</u>) 	Secretary, Chapter Administrator	High	< 6 months
	Assign responsibility for updating the Guidebook on a predetermined schedule	President, Guidebook Committee	High	< 6 months ongoing
	 Assign responsibility for responding to questions, error notices, complaints, and recommendations regarding Guidebooks 	President, Guidebook Committee	High	< 6 months ongoing
4.10 - Comply with APA National Chapter Performance Standards	Adopt income-based dues structure	Treasurer, Chapter Board	High	< 6 months