



American Planning Association
Indiana Chapter

Creating Great Communities for All

Strategic Plan

2021-2023

**Acknowledgments for
this plan are given to:**

**APA Indiana Board of
Directors**

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The Corydon Group

Notice

In preparation for a strategic planning retreat, APA-IN officers identified key opportunities for the organization to improve services to members, enhance the quality of service and engagement for members of the board, and advance the image and quality of the profession to stakeholders and practitioners.

In August 2021, members of the APA-IN board met in an extended retreat session to outline strategic objections for key areas of APA-IN.

This plan was adopted by the APA-IN board in November 2021.

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About the Association

ABOUT

APA Indiana is the state affiliate to the American Planning Association. The American Planning Association is an independent, not-for-profit educational organization that provides leadership in the development of all communities. APA's reach is through a number of component parts including APA national, the American Institute of Certified Planners, APA Divisions, planning student organizations, and the chapters. Chapters are one of the primary ways that APA members are serviced. There are currently 47 chapters across the US.

This document is a compilation of the original strategic plan and a strategic planning session held in August 2021 and a member focus group conducted in October 2021: This document will serve to:

- Help guide the annual work plan for the APA Indiana Chapter;
- Provide for accountability and help us realize our long-term vision and goals;
- Provide for consistency and open communications on what is important to planners in Indiana.

CHAPTER MISSION

The Indiana Chapter of the American Planning Association advocates good planning for making great communities. APA-IN promotes vision and leadership that fosters better planning in Indiana by building public and political support for sound planning and providing its members with the tools and support that advance planning.

CHAPTER VISION

- APA-IN strives to be the authority on innovative planning that rises to today's challenges and meets emerging needs.
- Planning is the best way of using public resources to create vital communities.
- APA-IN and its members are leading the way toward a stronger economy, a better environment, and a more equitable society.
- APA-IN wants to give communities the confidence that good planning will help them make wise decisions and sound investments to reach their goals.

CHAPTER VALUES

The APA-IN Chapter believes:

- Planning is a critical function of government, citizens, and the private sector;
- Planning brings forth the best ideas by balancing varied interests and resources;
- Planning is objective and open-minded;
- Planning is comprehensive, inclusive, and empowering; and
- Planning values the diversity of Indiana's communities, cultures and places.

2022 Priorities

I. BOARD DEVELOPMENT AND GOVERNANCE

Board service with a not-for-profit corporation is an opportunity to serve in a unique way. Since a not-for-profit corporation does not have owners in the form of shareholders or proprietors, board members serve as proxies to represent the interests of contributors, clients, and/or members. Non-profit board members have a legal responsibility to oversee the finances of the organization, and a moral obligation to assure that the organization fulfills its mission and operates in an ethical manner.

The Board of Directors for APA-IN has a unique structure, partially mandated by the APA national organization and is composed of a number of voting and non-voting members. The board includes a number of regional representatives, committee co-chairs in ex-officio capacity, and a number of voting members and officers.

In recent years, there has been growing concern among board officers that board service has become less attractive to APA-IN members as vacancies are often hard to fill. Within the board, there is a sense that the qualities of 'good' board service not always understood by board members, sometimes affecting the quality of board discussion and engagement.

New board members, whether they are only new to the APA-IN board, or new to board service, don't always come to the task having been trained and oriented to the principles of good board service and to the specifics of APA-IN. Because of that, there may be a perceived disconnect between expectations placed on APA-IN board members and their ability to fulfill those expectations. There is a sense that, over time, expectations have been lowered or eased, and as a consequence, service on the APA-IN board has become less valued.

To address these concerns, the following objectives have been established:

1. **Board Expectations Document** – By Month/Year, the APA-IN board of directors, consulting the APA-IN by-laws and adopting 'board best practices,' will revise the Board Expectations document that all board members are required to sign at the beginning of each year. The revised document will include, but not be limited to:
 - a. Board meeting attendance requirements;
 - b. Conference attendance expectations;
 - c. Committee participation expectations;
 - d. Confidentiality of board actions & discussions;
 - e. Code of ethics;
 - f. Conflict of interest declaration expectations; and,
 - g. Other expectations deemed necessary by the board.

One intent of the expectations document is to communicate the importance and value to the organization of a committed board that engages with the organization and, in so doing, to raise the quality of board service to elevate its desirability to potential board members. When there are position descriptions (i.e. for officers, faculty representative, etc.), these will be made a part of the appropriate board expectation document signed by the respective board member.

The board expectation document shall be signed by all board members each year and counter-signed by the board president.

2. Job Descriptions – The APA-IN Board will develop ‘job descriptions’ for Regional Representatives, and committee co-chairs that amplify the functions outlined in the by-laws. These documents will be attached to the respective Board Expectations document for each board member.

This task will be completed by the APA-IN board Executive Committee, or its designee, before the new term of the board members commences.

3. New Member Orientation – Board service is not intrinsically understood by all parties that come onto a board. Even experienced board members may not intrinsically be aware of the nuances and intricacies of the organization’s board they are joining. That is why it is important that a ‘new board member orientation’ be conducted for each new class of board members as they begin their first term.

For APA-IN a new board member orientation should include, at a minimum, a review of the organization’s by-laws, organizational structure, budget, board roster, the chapter’s relationship to the national organization, legislative priorities, committee structure, and other information deemed relevant by the board.

The orientation should be at least semi-formal so that it is consistent from board term to board term, and printed materials (e.g. by-laws, board roster, should be presented to new board members at the time of the orientation).

II. MEMBER ENGAGEMENT

Members are the reason APA-IN exists. The organization was created and is sustained by members who pay dues and participate in hopes of addressing common needs they have as planners and planning professionals, helping to advance the practice of planning, and continuing their professional development.

Membership Survey

In a survey conducted in August, 2021 of APA-IN members, when asked ‘how good a value is an APA-IN membership,’ respondents responded:

Rating	Percent of Total
Very Good Value	11.2%
Good Value	46.9%
Average Value	28.57%
Poor Value	8.16%
Very Poor Value	5.1%

From these results, 58.16% see APA-IN as a ‘very good’ or ‘good’ value, while 41.83% rated it as an ‘average,’ ‘poor,’ or ‘very poor value.’ While having over 58% of the members rating the experience with the associa-

tion as 'good,' is exemplary, the 28+% who rate the value as 'average,' represents a group of members who are engaged with the organization and whose opinion of the organization can be improved with some effort and focus.

October 2021 Focus Group Findings

During the APA-IN Fall Conference in Bloomington, Indiana, an informal focus group was conducted with eight members representing different geographic areas, different experience levels, and varying tenures in APA-IN membership. Five major themes emerged from the discussion:

- Mentoring of other staff, particularly in rural areas, is needed;
- More practical guidance on AICP is needed;
- APA-IN has little applicability to certain practices of planning, e.g. transportation;
- Coordination with other organizations for CM credits would be beneficial to members; and,
- Basic training for new planners operating in the field is necessary.

General comments during the focus group may further inform planning for professional development and member engagement:

- The connections between planning and economic development are crucial and should be explored for joint programming;
- Much of the programming in APA-IN is too general. It may be that in trying to provide programming that appeals to a broad audience, the programming may not appeal to anybody.
- However, programming needs to apply to the diversity of practice represented in the membership, different formats need to be considered: focused networking, affinity groups, specialized virtual sessions;
- Engage community foundations;
- More practical skills training: basic site plan review, development plan review, mock hearings;
- The Listserv is good;
- Planners need exposure to other planning practices/types;
- Basic training on municipal finance is needed;

To address the concerns raised in the member survey and focus group, the following objectives have been established:

- 1. Annual Focus Group** – At an APA-IN conference, annually convene a breakfast 'focus group' among 8 – 10 members to explore in some detail their expectations of the association, their specific interest in topics for professional development, and their desired delivery methods. If possible, start this activity at the conference in October 2021 and make it an annual activity.

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2. **Annual Survey** – Use some of the insights and information gleaned from the focus group in an annual survey to members, soliciting additional validation about topics for webinars, conference sessions, workshops, podcasts, etc.
 3. **Discussion Board** – Create a ‘discussion board’ on the revised web site that allows members to post questions or solicit feedback from other members as a way to further connect members outside of conferences, promote best practices, and further meet the needs of members to share knowledge and information.
 - Board members should monitor the discussion board regularly to glean potential topics for webinars, workshops, conference session topics and to identify APA-IN members with specific expertise in those topics as they respond and communicate within the discussion board.
 4. **Blue Book** – The Blue Book has been identified by members as a particularly vital resource and benefit of the association. A scheduled and plan for revising the publication should be established before the end of 2021 and implemented.
 5. **Conference Evaluations** – Continue the practice of offering evaluations at all APA-IN professional development activities to monitor for opportunities to improve, maintain desired practices, and seek additional topics to meet members’ needs.
 6. **Develop Template for Regional Events** – Develop, distribute, and implement a template for regional events that brings some level of consistency to events and provides guidance for the regional representatives. Have the template completed by the end of 2021.
 7. **Regional Zoom Focus Groups** – Host regional ‘Zoom focus groups’ to further generate information and input from members about needs and professional development topics and to provide opportunities to connect members to the chapter at times between other events. Plan and implement these beginning in early 2022.

III. DIVERSITY, EQUITY AND INCLUSION

Like many professions, planning is evolving, but still may not be attracting diverse incumbents. APA-IN, like many organizations, has a desire to make the practice and profession of planning more accessible to diverse audiences and to assure that the practice of planning is applied equitably across many communities.

At the August 2021 planning retreat, the board began with a definition of the diverse audiences that APA-IN needs to be cognizant of:

- Race
- Ethnicity
- Age
- Gender
- LGBTQ
- Ability/disability
- Geography/urban/rural
- Political party affiliation
- Socio-economic status

The Diversity, Equity and Inclusion Committee is empowered by the board to set the direction and implement strategies for this initiative.

Committee Description

The APA Indiana Diversity, Equity and Inclusion Committee works to understand and address the challenges of systemic inequity in the field of planning, raise awareness and educate in planning best practices for diversity, equity and inclusion. The following goals and strategies were developed by the DEI Committee.

Goals/Strategies

1. Cultivate culturally competent planners who understand embedded inequities that impact the lives of so many in our state.
 - Strategy 1: Facilitate sessions at the chapter professional development conferences
 - Strategy 2: Host events that build awareness about DEI.
 - Strategy 3: Create a best practices toolkit.
2. Increase the diversity of the planning profession, and the membership and leadership of our organization to reflect the communities we serve.
 - Strategy 1: Publish a study/report about DEI in our chapter.

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- Strategy 2: Identify and provide recommendations to actively address barriers to recruitment and retention of underrepresented peoples in the profession and the APA-IN board and membership.
 - Strategy 3: Establish a mentor-to-mentor program for minority students, new and incoming professionals and current/senior planning professionals.
3. Advocate for policies that support equity in all aspects of planning at local, state, and federal levels.
- Strategy 1: Provide insights on State policy trends that have an impact on equitable planning.
 - Strategy 2: Outreach to State legislators and local decision/policy makers.
 - Strategy 3: Engage in local initiatives with overstepping APA National and State requirements.

IV. ADVANCING THE PROFESSION

'Planning,' like most professions and professional activities, is barely understood and sometimes misunderstood, by those outside the activity. The result is that the activity and the profession may be undervalued by leaders and citizens alike, and underutilized.

APA-IN members, in the August 2021 survey reported that one of the reasons for joining the association is that it 'enhances credibility' of the planner and planning profession.

In discussions preceding the strategic planning session, executive committee members expressed a need to find a way to better support members by advancing understanding of the planning process and the role that planners play within their communities.

During the strategic planning retreat, board members identified key qualities of the planning process that could be part of a promotional and educational process to promote planning to stakeholders and the general public:

- **Guide** – Planners guide the creation of the places where people live, work and play.
- **Coordinate** – Planning is a 'team' activity, requiring contributions from elected officials, attorneys, architects, citizens, utilities, developers, and others. Planners coordinate the contributions from all these players.
- **Mediate** – With multiple players and constituents involved in any playing project, there can be diverse and conflicting interests in the project. Planners mediate among those different interests and viewpoints to resolve conflicts.
- **Translate** – Planning projects begin with dreams and concepts: planners are adept at translating concepts and ideas into actionable project plans that can be built and brought into reality.
- **Educate** – Planners are instrumental in helping to explain and educate about the concepts and value of good planning and the consequences of failing to plan.

Ongoing Goals and Priorities (Adopted from the 2018 - 2020 Plan)

I. CHAPTER GOALS AND OBJECTIVES

GOAL 1: Foster a supportive legislative framework for quality planning throughout Indiana by actively seeking to influence legislation at the General Assembly, collaborating with policy makers at all levels of government, and communicating pertinent legislative issues to the Chapter's membership.

OBJECTIVES:

1. Establish APA-IN as the go-to expert on planning and zoning issues with legislators, regulators, the media, and the public. (Legislative Committee / Communications Committees) (2017 Plan)
2. Provide opportunities for Chapter members to become acquainted with pertinent areas of state and local laws and regulations pertinent to planning. (PDO / Legislative Committee) (2017 Plan)
3. Strengthen the relationship among key allied professions and related organizations to identify and advocate for shared legislative and policy initiatives. Put together a contact list and reach out annually to INASLA, AIA Indiana, Indiana Bar Association Land Use and Zoning Section, AIM, AIC and ASCE Indiana Section to coordinate on legislative endeavors. (Legislative Committee) (2017 Plan)
4. Develop a Planners' Day at the Statehouse. (Legislative Committee) (2017 Plan)
5. Review current APA Policy Guides and recommend adoption/modification of guides for use at the state level to guide state, regional and local planning policy. (Legislative Committee) (2017 Plan)

GOAL 2: Promote the value of planning to residents, local officials, and other stakeholders through education and advocacy efforts.

OBJECTIVES:

1. Establish an extension of APA's "Best Places" program for Indiana communities. (Awards Committee / Region Representatives) (2017 Plan)
2. Improve the utilization of social media to inform the membership and public of important planning issues at a regional or statewide level. (Communications Committee) (2017 Plan)
3. Increase public awareness and education on critical issues facing Indiana communities. (PODO/ Communication) (2017 Plan)
4. Revamp website design/look and brand. (Communications Committee) (2017 Plan)
5. Create a general communications plan for the Chapter to communicate a consistent message of good planning. (Communications Committee) (2017 Plan)

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6. Establish a fresh marketing plan for the Hoosier Planning Award program to raise its visibility within the state and increase the number of nominations for all planning awards. (Awards Committee / Communications Committee) (2017 Plan)

GOAL 3: Provide for the efficient and effective administration of the Chapter.

OBJECTIVES:

1. Develop an Association Policy and Procedure Manual. (Board / Association Staff) (2017 Plan)
2. Prepare and publish an annual "State of the Chapter" report to the membership that addresses progress towards goals and accomplishments, reports from all elected board positions and committees, major issues facing planning regionally and statewide, and financial reporting and future plans. (President / Communications Committee / Association Staff) (2017 Plan)
3. Increase diversity of Chapter revenue in addition to membership dues by continuing to maintain additional operating revenue generation from sponsorships, merchandise sales and conferences. (Treasurer / Sponsorship Committee) (2017 Plan)

GOAL 4: Expand opportunities for meaningful engagement and promote active participation by members and develop future Chapter and National APA leaders.

OBJECTIVES:

1. Identify specific roles and tasks that volunteers are needed for based on the membership's interests. Promote volunteer opportunities on the website, emails, in surveys, and directly in person or via email. (President / Region Representatives / Communications Committee) (2017 Plan)
2. Conduct an annual survey of the membership to determine member interests. (Membership Committee) 2017 Plan)
3. Develop and conduct an annual training for new board members. (Board / Association Staff) (2017 Plan)
4. Make board meetings more of working group to assist board members and provide feedback, and work on items in the Strategic Plan. (Board / Association Staff) (2017 Plan)

GOAL 5: Establish mutually-beneficial partnerships between the Chapter and the professional organizations of allied professions, institutions of higher education, trade associations, and other related-organizations to advance the value of the planning profession and support good planning practice.

OBJECTIVES:

1. Encourage other organizations to provide CM credit opportunities. (PDO / PODO)

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2. Develop and promote a Speakers Bureau of APA-IN members to speak at other organization conferences/seminars. (PDO / PODO)
 3. Participate in regular meetings with allied professions groups. (Allied Profession Liaison)

GOAL 6: Provide for the professional development of the practicing planner, the aspiring planner, and planning officials through networking, mentoring, information sharing, and high-quality educational offerings.

OBJECTIVES:

1. Increase diversity of speakers and topics at conferences. (PDO)
2. Provide additional networking opportunities for members. (PDO)
3. Hold at least one regional event in each region each year. (Region Representatives)
4. Increase the number of members holding the designation of AICP. (PDO)
5. Continue to assist members lagging in CM credits to retain AICP membership through identification of CM credit opportunities during the grace period and complementary notification of missing requirements well ahead of the grace period deadline. (PDO)
6. Support regional training programs for plan commission, elected officials and BZA members. (PODO / Region Representatives)

GOAL 7: Sustain and increase the number of Chapter memberships.

OBJECTIVES:

1. Develop a welcome package for new Chapter members to orient them with Chapter services and how to get involved in Chapter activities. Send the packet directly to new members and make the packet available on the website. (Membership Committee) Reach out with a personal phone call or email from a Chapter board member to each new
2. Chapter members to welcome him or her to the Chapter, orient him or her with Chapter services, and get him or her involved with Chapter activities. (Board / Membership Committee)
3. Increase undergraduate and graduate student memberships and work with Indiana universities to promote the membership. (Faculty Representative / Membership Committee)
4. Create opportunities to engage student members. (Faculty Representative)
5. Conduct a membership drive of planners and planning officials. (Membership Committee)
6. Provide people who dropped their membership in the past year with an exit survey. (Membership Committee)

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7. Work closely with the AICP Commission Regional Director for the benefit of our AICP members on Commission policies, CM, and ethics. (Board)

GOAL 8: Maintain a high level of engagement at the National APA level for the benefit of Chapter members.

OBJECTIVES:

1. Support chapter members that strive to run for or are currently in national leadership positions. (Board)
2. Work closely with our APA Regional Director and at-large directors to advocate for national policy decisions beneficial to Chapter members. (Board)
3. Work closely with the AICP Commission Regional Director for the benefit of our AICP members on Commission policies, CM, and ethics. (Board)
