Oregon Chapter of the American Planning Association Strategic Plan 2018 Update

Relevant Resources
Better Planners
Exceptional Communities



Adopted by the Board of the Oregon Chapter of the American Planning Association (OAPA), November 16, 2018.

Prepared by

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Introduction

This Strategic Plan is a management tool for the Oregon Chapter of the American Planning Association (OAPA) to align its everyday operations with its mission and vision. The plan is organized into the following three sections that combine to form purpose-driven and focused priorities and actions:

- 1. Purpose OAPA's mission and vision.
- **2. Getting There** How OAPA will achieve its mission and vision.
- **3. Measuring Success** How OAPA will know this plan is being successfully implemented.

Closing out the Strategic Plan is an overview of the strategic planning process and how OAPA will keep it relevant and updated into the future.

Purpose

OAPA's Mission

Relevant Resources, Better Planners, Exceptional Communities

OAPA's Vision

OAPA promotes the art and science of planning in Oregon that fosters social equity, economic viability, and protection and regeneration of the natural environment, with emphasis on creating more resilient and adaptable people and places today and for a more sustainable future. OAPA and its members engage with Oregonians and other stakeholders about the value of planning and how it impacts our quality of life, and encourage people's involvement in their communities. OAPA strives to provide resources and opportunities for professional planners because well-equipped, well-trained planning professionals translate into better outcomes for the communities we serve.

In addition, OAPA is committed to carrying out the Mission and Vision of the American Planning Association (APA), which provides leadership in the development of vital communities by advocating excellence in community planning, promoting education and citizen empowerment, and providing the tools and support necessary to meet the challenges of growth and change.

APA's Mission – Creating great communities for all.

APA's Vision – APA advances planning through leadership in education, research, advocacy, and ethical practice.

Getting There

Guiding Principles

Professional Development – Oregon needs highly skilled planners and informed citizens to help create and sustain great communities. OAPA provides workshops and trainings on a variety of topics in multiple locations throughout the state for member and non-member planners. OAPA supports excellence in local decision making by offering training, information, and other resources to planning commissioners, elected officials, and engaged community members.

Advocacy – Oregon needs champions of planning who can advocate for sound planning practices and policies that are reflective of and responsive to Oregon's diverse people and places. OAPA engages with decision makers and the public in order to facilitate a better understanding of the impacts of planning decisions, improve planning and its outcomes for our state and communities, and advocate for every person's opportunity to participate.

Community – OAPA needs resources and a structure that enables volunteer leaders and staff to accomplish the organization's goals and support the needs of its members. OAPA works to ensure that the organization is relevant, efficient, and effective and provides a variety of networking and volunteer opportunities for members.

Diversity, Equity, and Inclusion – Oregon needs diverse and culturally responsive planning professionals to support more inclusive, just, and equitable communities through a planning profession as diverse and inclusive as the communities we serve. OAPA equips planners to perform inclusive, culturally competent, and equitable planning practices, and works effectively across Oregon's diverse urban and rural communities.

How do we define diversity, equity, and inclusion?

Diversity is an inclusive concept that "encompasses, but is not limited to race, ethnicity, class, gender, age, sexuality, ability, educational attainment, spiritual beliefs, creed, culture, tribal affiliation, nationality, immigration status, political beliefs[,] veteran status", and geographic location. "With greater diversity, we can be more creative, effective and just, and bring more varied perspectives, experiences, backgrounds, talents and interests to the practice of planning and to the communities we serve. We recognize that achieving diversity and inclusion is an evolutionary process that requires an ongoing renewal of our commitment." (Adapted from APA's Diversity and Inclusion Strategy, Adopted April 2018)

Equity is "just and fair inclusion into a society in which all can participate, prosper, and reach their full potential. Unlocking the promise of the nation by unleashing the promise in us all." (PolicyLink Equity Manifesto, 2018)

Inclusion means that everyone can participate and everyone belongs. Inclusion applies to all components of the planning process – from how we do planning in alignment with Oregon's Statewide Planning Goal 1: Citizen Involvement to how we comprehensively plan for, design and build, and manage our communities, farm and forest lands, and natural spaces and resources.

Goals and Objectives

The following Goals and Objectives support OAPA's Mission and Vision and are in line with the Guiding Principles.

- **Goal 1.** Ensure that planners in Oregon possess the knowledge, skills, tools, and abilities to create and sustain vital communities. (Professional Development)
 - Objective 1a. Provide high-quality and affordable training and networking opportunities for planners throughout Oregon, as well as educational opportunities for associated non-professionals (such as elected and appointed officials). Partner with allied and aligned organizations to provide additional opportunities for members to access relevant information, tools, and training.
 - **Objective 1b.** Promote membership in and support members of the American Institute of Certified Planners (AICP) by providing information about and support for achieving certification and access to certification maintenance opportunities, especially regarding legal issues, ethics, and community engagement.
- **Goal 2.** Lead and shape discussions about policy issues. (Advocacy)
 - **Objective 2a.** Provide legislation and policy education and advocacy. Advocate for and educate members about both planning legislation and related policy at the state level as well as non-legislative national, state, and local policy activities.
- **Goal 3.** Increase opportunities for the public, elected and appointed officials, partner organizations, and youth to understand and support planning and planners in our communities. (Advocacy)
 - **Objective 3a.** Develop and implement public education programs to communicate the value of planning so the public can connect community planning to their everyday lives, such as encouraging participation in National Community Planning Month.
 - **Objective 3b.** Engage and inform diverse youth about the field of planning and its professional opportunities through Chapter and partner education and outreach events, school curriculum, and other opportunities.
 - **Objective 3c.** Engage partner organizations and other key planning constituencies in community-building activities important to the planning profession.
 - **Objective 3d.** Increase the visibility and accessibility of community planning information and Chapter activities through social media, newsletters, the Oregon Planners' Journal, and the OAPA website.

- **Goal 4.** Ensure that the organization builds volunteer leadership capacity, makes effective use of staff, and maximizes resources through partnerships and other opportunities in order to achieve its goals. Strive to serve the diverse needs of the Chapter's membership and maintain relevance and value as an organization through robust and innovative membership and volunteer strategies. (Community)
 - Objective 4a. Increase membership, including new and renewing members, and networking opportunities. Focus on increasing membership among planners and non-planners in planning related fields. Provide both formal and informal opportunities for members to network and build career opportunities, including a focus on emerging planners and planners of varied backgrounds.
 - **Objective 4b.** Increase volunteer satisfaction and broaden member participation in volunteer activities that advance OAPA's Strategic Plan. Regularly assess volunteer efforts, satisfaction, and trends, and identify opportunities and priorities for volunteer engagement. Ensure that volunteer opportunities and specific needs are clearly communicated.
 - Objective 4c . Provide formal recognition of outstanding planners and planning projects as a way to further engage members and the broader community through OAPA Awards. Provide Chapter support for wider recognition of Oregon planners, projects, and places, such as APA's National Planning Awards and Great Places in America program.
 - **Objective 4d.** Expand use of communication tools and outreach in a strategic manner to ensure effectiveness and focus.
 - **Objective 4e.** Plan and price events at affordable rates to encourage participation. Provide the financial support necessary to host events and secondarily support other organizational programs and services.
 - **Objective 4f.** Manage revenue and resources efficiently to support OAPA's operational, financial, and strategic objectives, including identifying additional funding opportunities when appropriate.
- Goal 5 Actively promote and increase diversity and cultural awareness within the planning profession and OAPA activities, and provide effective leadership in advocacy of equity and inclusiveness in planning policies and regulations reflective of Oregon's diverse people and places. Build the capacity of planners to practice inclusive, culturally competent, and equitable planning practices. (Diversity, Equity, and Inclusion)
 - **Objective 5a.** Raise awareness of the importance of diversity, equity, and inclusion strategies in planning policy and practice in general, and integrate into educational offerings, outreach and networking activities, and advocacy work. Be deliberate in the process and review of Chapter activities, such as using an equity filter, to create better outcomes.

- **Objective 5b.** Provide resources, education forums, and opportunities for planners, students, and university faculty of different backgrounds and geographic locations to build meaningful connections, share ideas, and bring recognition to unique values and perspectives.
- Objective 5c. Identify and promote resources and opportunities that reduce barriers to recruitment and retention of underrepresented peoples in the planning profession and as elected and appointed officials, including but not limited to people of color, women, and LGBTQ+ individuals. Actively engage underrepresented peoples in OAPA activities and leadership positions. Create and maintain safe spaces that welcome missing knowledge and experiences and break down barriers.
- **Objective 5d.** Encourage use of minority-owned, women-owned, and emerging small businesses (MWESB) as contractors and vendors to promote inclusion and a sustained, vibrant local economy.

Strategic Initiatives & Committees

The Strategic Plan is implemented through OAPA's annual business plan and budgeting process. The organization uses a committee structure led by volunteers to provide services and programs, with contract staff support. Committees are responsible for identifying, implementing, and evaluating these offerings, which are designed to be specific, measurable, and achievable, with flexibility provided by annual planning to modify identified strategies as needed. The Board may also identify stand-alone, short- or long-term strategic initiatives based on member feedback or direction from APA National, such as developing a Diversity, Equity, and Inclusion strategy, with incorporation into the annual business plan and budgeting process to ensure there is necessary organizational capacity.









Most committees meet monthly throughout the year, while others focus on specific one-time events or activities, such as the Annual Conference and Awards. The Board as a whole is responsible for ensuring OAPA provides value and relevance to its members and potential members. The Board is also responsible for organization-wide initiatives and ensuring the Mission and Vision are met in keeping with the Guiding Principles.

An overview of how the work of the committees and the Board supports the Strategic Plan is included in **Appendix A**. Descriptions of current committees are listed below.

Professional Development Committee (PDC) – PDC provides continuing education opportunities for OAPA members and non-members, offering training events around the state each year geared towards both professional planners and planning commissioners. PDC supports members in earning and maintaining their AICP certification, offering numerous CM-eligible activities, including required legal and ethics education. PDC also partners with allied organizations to co-sponsor events that may be of interest to OAPA members.

Legislative and Policy Advisory Committee (LPAC) – LPAC is responsible for developing and implementing the Chapter's legislative and policy action program. LPAC tracks planning related bills every state legislative session and related State rulemaking.

Policy Subcommittee – The Policy Subcommittee, created by LPAC, tracks and comments on non-legislative national, state, and local policy activities.

Education and Outreach Committee (EOC) – EOC works on a variety of projects and programs to help our members reach out to their communities, including elected officials, neighborhood and other community groups, teachers and students, etc., about why planning matters and how to get involved.

Membership Committee – The Membership Committee assists the Board in maintaining open communication with all members, recruiting and retaining members, and conducting biennial surveys to gather member feedback.

Emerging Planners Group (EPG) – EPG organizes events and activities intended to provide career growth and networking opportunities for OAPA members who are new to the planning field. All OAPA members are encouraged to participate in EPG initiatives, particularly those that involve mentorship and training opportunities for EPG members. EPG also facilitates the highly successful OAPA Mentorship Program. (Proposed to become a committee.)

Communications Team – The Communications Team implements an overall communications strategy to increase visibility of Chapter activities and community planning information using a variety of tools to ensure effectiveness and focus, including a bi-monthly newsletter, the Oregon Planners' Journal, social media, and the website. (Proposed to become a committee.)

Diversity, Equity, and Inclusion Group (DEIG) – DEIG works across OAPA committees and with the Board to promote and increase diversity and cultural awareness within the planning profession, membership and volunteers, and chapter activities. DEIG serves as a resource to help committees integrate diversity, equity, and inclusion strategies into OAPA's offerings, advocacy, and operations. (Proposed initially as a working group with liaisons from the Board and committees plus additional OAPA members.)

Awards Committee – The Awards Committee seeks nominees for outstanding contributions to planning in Oregon. Each year, the Chapter honors outstanding efforts in planning and planning leadership, with awards presentations made at the OAPA Annual Planning Conference.

Conference Committee – The Conference Committee plans OAPA's Annual Conference.

Measuring Success

The OAPA Board tracks Strategic Plan implementation annually and periodically through:

- Business planning and budgeting each year, including review of the business plan and financials at the Board's annual retreat;
- Chapter's Annual Report;
- Monthly board meetings; and
- Periodic membership surveys to gather feedback on member interests and needs and assess the organization's value and relevance.

Committees are responsible for reporting out on their work to inform updates to the business plan and budget each year and for tracking and reporting out on progress toward the Strategic Plan's goals and objectives. Committee chairs share progress toward identified goals and objectives through the annual review of the business plan, with discussion and assessment by the Board as whole at its annual retreat typically held in January or early February. Based on progress, or lack thereof, and Board feedback, committees make any needed adjustments to their plan for the remainder of the year, and in March begin planning and budgeting for the next fiscal year.

OAPA's Annual Report, which provides an overview of the prior year's achievements, is the primary method for reporting out on progress toward the Strategic Plan's goals and objectives. It is provided to APA, shared with members each fall at the Chapter's annual business meeting held during the annual conference, and available to members and the community at large in print and on OAPA's website. Each committee's portion of the business plan is specifically tied to the goals and objectives of the Strategic Plan. Summarized in the Annual Report, results from each are used to measure success of the committee's strategic initiatives. Current measures include:

- Number of committee members and other volunteers involved in Chapter activities;
- Events and sessions held, webinars offered;
- Attendance numbers and hours of CM credits offered;
- Bills tracked and letters submitted;
- Awards given;
- Numbers of new and renewing members; and
- Overall Chapter statistics, such as revenue and expenditures, geographic distribution of members and locations of events, among others.

More subjective information, such as the results of participant event surveys and feedback from volunteers, also helps inform success and drive changes or improvements to offerings when needed.

In 2018-2019, committees will review and identify measurable metrics for relevant objectives to provide a more formal and consistent method for reviewing business plans and evaluating OAPA's success in implementing the Strategic Plan. This approach is intended to provide an efficient way to review the implementing strategies that support the Strategic Plan and identify any necessary updates. As part of this review, committees may decide to adjust

measures to better reflect goals and desired outcomes, such as % of new attendees, % of repeat attendees, or % of bills advocated for that passed.

Monthly OAPA Board meetings provide an opportunity for committee chairs to provide updates on planned activities and share successes, in addition to the Treasurer's report and review of the business plan. Board meetings also provide opportunities to discuss Chapterwide topics of concern and explore proposals and opportunities, such as grants.

OAPA conducts a membership survey every other year, with the next survey due Spring 2019. Survey results are used to inform committee focus and programing, communication strategies, and allocation of Chapter resources, as well as gauge member satisfaction with the services provided. The membership survey typically includes a set of standard questions as well as topical questions for which the Chapter would like feedback, such as:

- Professional interests,
- Most important outcome of the State land use planning program,
- Most valued OAPA programs or services,
- Communications preferences,
- Training opportunity interests,
- Partner events focus,
- Health and planning,
- Education and outreach topics,
- Legislative and policy priorities,
- Resource allocation,
- Additional services desired,
- Committee participation or interest, and
- Demographics.

In 2018-2019 the membership survey will be reviewed at the Board's annual retreat to make sure OAPA is asking questions that align with the Strategic Plan.

Strategic Planning Process

Methods

The 2018 update of the Strategic Plan was kicked off by revisiting OAPA's mission statement in January 2018, which centered on surveying membership about OAPA's purpose, core values, and indicators of a successful organization. The Board reviewed the survey results and crafted a draft mission statement at its February 2018 Board retreat, which it subsequently adopted. The Board President, Vice President, and contract staff next revisited the existing Strategic Plan to identify what remained relevant and what needed to be updated. OAPA committees and forming committees provided input on existing and updated goals and strategies, as well as a vision statement, to capture what OAPA does and how to best measure success. They also provided updates to annual strategies for inclusion in the 2018–2019 business plan.

Based on membership and committee input, an update to the Strategic Plan was drafted for the Board's review in August 2018, followed by a membership review and revision effort including an August 2018 survey, culminating in additional member input at the Chapter's annual meeting in October at the 2018 OAPA Annual Conference. Based on input received, the updated Strategic Plan was revised and presented to the Board for approval and implementation in November 2018 and then shared with OAPA's members.

The 2018 update of OAPA's Strategic Plan builds off the Strategic Plan created in 2014 for the 2014 – 2018 period. To develop that plan, OAPA staff and volunteers engaged in a strategic planning process from November 2013 through June 2014. During the environmental scan phase input was received from Board members and staff via a survey and interviews; from DLCD staff members at a meeting; and from interviews of OAPA members, volunteers, and officials representing a variety of organizations involved in planning issues in Oregon. Subsequently the Board met for a strategic planning retreat to work on key initiatives and refine goals and strategies, followed by Board review then adoption at the Chapter's 2014 annual meeting.

Future Updates

The Strategic Plan does not have an end date. Instead, the Board has made a commitment to reviewing it periodically — annually at minimum — and updating as needed when identified through these periodic reviews. Review will include an environmental scan and assessment of influential trends that may impact or bolster the Chapter's work. Annual business plan review, which will include committee progress reports on strategic initiatives in support of the Strategic Plan, will be another source for identifying update needs. The results of the biennial membership survey will also be reviewed for identification of potential update needs. Future Strategic Plan updates will include membership, volunteer, and Board review and input, as well as feedback from additional stakeholders as needed.

References

- APA Diversity and Inclusion Strategy, Adopted April 2018; https://www.planning.org/media/document/9149453/
- PolicyLink Equity Manifesto, 2018; http://www.policylink.org/resources-tools/equity-manifesto

Appendix A. Goals and Objectives Met by OAPA Initiatives and Committee Responsibility

	Board	PDC	EOC	LPAC	MEMB	EPG	СОММ	AWA	ELEC	CONF	DEIG
Goal 1. Ensure that planners in Oregon possess the knowledge, skills, tools, and abilities to create and sustain vital communities. (Professional Development)											
Objective 1a. Provide high-quality and affordable training and networking opportunities for planners throughout Oregon, as well as educational opportunities for associated non-professionals (such as elected and appointed officials). Partner with allied and aligned organizations to provide additional opportunities for members to access relevant information, tools, and training.		•				•				•	•
Objective 1b. Promote membership in and support members of the American Institute of Certified Planners (AICP) by providing information about and support for achieving certification and access to certification maintenance opportunities, especially regarding legal issues, ethics, and community engagement.		•				•					•
Goal 2. Lead and shape discussions about policy issues. (Adv	осасу)										
Objective 2a. Provide legislation and policy education and advocacy. Advocate for and educate members about both legislative and ongoing land use and related policy at the state level as well as non-legislative national, state, and local policy activities.			•	•		•					•
Goal 3. Increase opportunities for the public, elected and appointed officials, partner organizations, and youth to understand and support the role and impacts of planning and planners in our communities. (Advocacy)											
Objective 3a. Develop and implement public education programs to communicate the value of planning so the public can connect community planning to their everyday lives, such as encouraging participation in National Community Planning Month.			•								•

	Board	PDC	EOC	LPAC	MEMB	EPG	СОММ	AWA	ELEC	CONF	DEIG
Objective 3b. Engage and inform diverse youth about the field of planning and its professional opportunities through Chapter and partner education and outreach events, school curriculum, and other opportunities.			•								•
Objective 3c. Engage partner organizations and other key planning constituencies in community-building activities important to the planning profession.			•								•
Objective 3d. Increase the visibility and accessibility of community planning information and Chapter activities through social media, newsletters, the Oregon Planners' Journal, and the OAPA website.			•				•				
Goal 4. Ensure that the organization builds volunteer leadership capacity, makes effective use of staff and maximizes resources through partnerships and other opportunities in order to achieve its goals. Strive to serve the diverse needs of the Chapter's membership and maintain relevance and value as an organization through robust and innovative membership and volunteer strategies. (Community)											
Objective 4a. Increase membership, including recruiting new members and retaining existing members, and networking opportunities. Focus on increasing membership among planners and non-planners in planning related fields. Provide both formal and informal opportunities for members to network and build career opportunities, including a focus on emerging planners and planners of varied backgrounds.	•	•	•	•	•	•	•	•	•	•	•
Objective 4b. Increase volunteer satisfaction and broaden member participation in volunteer activities that advance OAPA's Strategic Plan. Regularly assess volunteer efforts, satisfaction, and trends, and identify opportunities and priorities for volunteer engagement. Ensure that volunteer opportunities and specific needs are clearly communicated.	•	•	•	•	•	•	•	•	•	•	•

	Board	PDC	EOC	LPAC	MEMB	EPG	СОММ	AWA	ELEC	CONF	DEIG
Objective 4c. Provide formal recognition of outstanding planners and planning projects as a way to further engage members and the broader community through OAPA Awards. Provide Chapter support for wider recognition of Oregon planners, projects, and places, such as APA's National Planning Awards and Great Places in America program.			•					•			
Objective 4d. Expand use of communication tools and outreach in a strategic manner to ensure effectiveness and focus.	•	•	•	•	•	•	•				•
Objective 4e. Plan and price events at affordable rates to encourage participation. Provide the financial support necessary to host events and secondarily support other organizational programs and services.		•				•				•	•
Objective 4f. Manage revenue and resources efficiently to support OAPA's operational, financial, and strategic objectives, including identifying additional funding opportunities when appropriate.	•									•	
Goal 5. Actively promote and increase diversity and cultural awareness within the planning profession and OAPA activities, and provide effective leadership in advocacy of equity and inclusiveness in planning policies and regulations reflective of Oregon's diverse population and geography. Build the capacity of planners to practice inclusive, culturally competent, and equitable planning practices. (Diversity, Equity, and Inclusion)											
Objective 5a. Raise awareness of the importance of diversity, equity, and inclusion strategies in planning policy and practice in general, and integrate into educational offerings, outreach and networking activities, and advocacy work. Be deliberate in the process and review of Chapter activities, such as using an equity filter, to create better outcomes.	•	•	•	•	•	•	•	•	•	•	•

	Board	PDC	EOC	LPAC	MEMB	EPG	СОММ	AWA	ELEC	CONF	DEIG
<i>Objective 5b.</i> Provide resources, education forums, and opportunities for planners, students, and university faculty of different backgrounds and geographic locations to build meaningful connections, share ideas, and bring recognition to unique values and perspectives.	•	•	•	•		•				•	•
Objective 5c. Identify and promote resources and opportunities that reduce barriers to recruitment and retention of underrepresented peoples in the planning profession and as elected and appointed officials, including but not limited to people of color, women, and LGBTQ+ individuals. Actively engage underrepresented peoples in OAPA activities and leadership positions. Create and maintain safe spaces that welcome missing knowledge and experiences and break down barriers.	•	•	•	•	•	•	•	•	•	•	•
Objective 5c. Encourage use of minority-owned, womenowned, and emerging small businesses (MWESB) as contractors and vendors to promote inclusion and a sustained, vibrant local economy.	•	•	•	•	•	•	•	•	•	•	•

Key: Board – Board of Directors

PDC – Professional Development Committee

EOC – Education and Outreach Committee

LPAC – Legislative and Policy Affairs Committee (including Policy Subcommittee) ELEC – Elections Committee

MEMB - Membership Committee

EPG – Emerging Planners Group

COMM – Communications

AWA – Awards Committee

CONF – Annual Conference Committee

DEIG – Diversity, Equity, and Inclusion Group

