



**American Planning Association
City Planning and Management Division
FY 2018 Performance Report
Charles C. Graves III; Division Chair**

1. **Work Plans and Budgets**

This past year (FY2018) the Division leadership reviewed the previous work plan, budget, mission, recruitment, and other strategic Division expectations.

With the input from the Division leadership, members, and APA national we are continuing to refine our communication approach, conference activities, new member recruitment, research, awards, and partnering with other Divisions and Chapters. The Division will continue to be involved in the Division Council and share the information with the Division members and provide feedback to the Division Council. We will also partner with other Divisions on programs and projects.

Two years ago the Division was involved in the discussion of how NPC sessions are now selected. This Division along with the Division Council expressed major concerns about the new approach. This Division will continue to monitor this change and give input on this issue.

2. **Communications**

This Division combines communication with retaining members, recruiting new members, and carrying out the Division mission of professional development, networking, and professional collegiality.

The Division has begun utilizing Survey Monkey to create and manage a newsletter for the Division. The initial target is to distribute quarterly, however this has not yet begun. This is an area where improvement is necessary and recognized.

The Division has utilized direct email to registered members in advance of the NPC to identify those sessions that are sponsored by the Division, and to promote to Planning Leadership Institute and Management Institute.

Another priority is to participate in our website reconstruction within the new APA online ecosystem. The current website is out of date.



3. **National Planning Conference 2018 Activities**

The Division sponsored two NPC sessions in 2018. The first session was titled “Planning Cities for the Future” and featured speakers on autonomous cars and parking impacts, housing standards, lifestyle changes, walkable neighborhoods and mixed-use development. Presenters were architects, planners and a futurist. Over 250 participants attended this event. (See attached)

The second NPC session was titled “Planning Office of the Future” featuring a panel consisting of an architect, planner, interior designer and moderated by Division Chair Mr. Graves. The session was standing room only with inquisitive questions on how land use and zoning should address parking, residential office and zoning issues. These two sessions were among the most attended at the 2018 NPC. The sessions built on the previous Division NPC sessions which guide planners in contemplating the future of cities and neighborhoods. Over the past year, APA changed the ways in which NPC sessions were selected. Although the Division submitted several proposed 2019 sessions, none were selected. We continue to support further change in the NPC session selection process to return to more directly incorporating the role of Divisions, as the NPC is a key, if not principal, outlet for Division programming.

The 2018 Division Annual Business Meeting on April 23rd was attended by 12 current and prospective members (see minutes, enclosed). Energy and enthusiasm for the mission and programming of the Division was notably higher than in the recent three years. Several of those attending were new to active engagement with the Division and have volunteered to support one or more Division activities.

4. **APA National Planning Conference 2019 Activities**

The City Planning and Management Division is planning several exciting and informative activities. The attached proposed sessions are subject to review and approval process by APA. Once decisions are made by APA the division will finalize the conference sessions.

A major activity at the APA Conference will be to promote and recruit new members to APA and the Division. We will contribute to staffing the Division booth consistent with recent years, distribute handouts that include Division information as well as planning advocacy handouts, such as the “Stand Up for Planning” bumper stickers. Prior to the APA NPC and sponsored conference session we will recruit members in an e-mail blast. As expanded upon later in this report, the Division will continue to support the Planning Leadership Institute and Planning Management Institute as valuable, in-depth training opportunities.

5. **Membership**

The City Planning & Management Division membership continued to grow tremendously for the second consecutive year. As shown in the table below, students are driving the dramatic increase in



membership and now (2018 Oct 31) comprise nearly 81% of Division members. However, it is important to note that non-student membership is also increased by 45% since 2016. The free student membership certainly is driving growth in this area of membership. We do not have insight into growth in other membership types, as our Division programming has not grown or changed substantially since 2016.

As the CP&M Division observes other Divisions expand their engagement opportunities through email newsletters and webinars, the Division is assessing how to adopt these best practices in an effort to improve value to members, and aid in attraction and retention.

City Planning & Management Division					
2018 Membership Report					
Title	2016	2017	2018	Change	
Students	87	1560	3506	1946	125%
Non-Students	571	644	829	185	29%
Total Members	658	2204	4335	2131	97%

* Membership figures as of 2018 November 1.

The Division does not presently have active committees or work groups other than the Division leadership. Leadership has discussed creation of work groups to advance Division initiatives during the annual meeting in 2017 and 2018. A work group is beginning to come together to support an electronic newsletter, yet this has not yet been launched.

6. **Fall Leadership Meetings**

The Division sent Chair Charles Graves and Secretary/Treasurer Joshua Clements to the Fall Leadership Meetings in Washington, DC. Travel and attendance by Mr. Graves was supported by the Division. Mr. Clements attended as an alternate so as to continue to improve the capacity of the leadership team to integrate with boarder APA governance and network with other Divisions and Chapters.

Division leadership has been in discussion with Mr. Mike Welch regarding potential future opportunities for Division-organized activities at the Fall meetings. Specifically, it was discussed organizing a session regarding the role of planners as critical leaders in our communities, building upon the elevated APA Advocacy program that focused on Federal policy.

7. **Research and Publications**

Since 2005, the Division has supported the **Planning Leadership** and **Planning Management Institutes** (and their predecessors) at the National Planning Conference, utilizing Division funds and volunteer time. These institutes celebrated their **14th year** at NPC in New Orleans.



The Planning Leadership Institute began in 2005 as the New Directors Institute (NDI), designed to provide a comprehensive training for new and aspiring leaders and managers in the planning profession. Recognizing the differing content between leadership and management, and to add depth of content, the Management Institute was created in 2009 as a stand-alone program, and the New Directors Institute was re-branded as the Planning Leadership Institute in 2015.

Since 2005, over 450 planners have graduated from the Institutes, ranging from big city and metro directors, small and rural community planners, county planners, private practice, and state agency staff. Attendees have included planners from nearly every state, as well as Canada, Australia, Puerto Rico, Guam, and the Philippines.

Division leadership has been in discussion with APA staff regarding the future of this program. We believe firmly that this is a critical program area for the Association, and one which will continue to be a central priority for the Division. However, we are aware that there are other dynamics with delivering the program as it currently exists concerning financial sustainability. Division leadership and members will continue to engage with APA staff as to how to continue to improve and offer this program in some format.

The Division is currently working with APA as these programs are being examined for restructuring in 2019. In addition, the Division is examining how to build from this success to offer webinars or research publications on the topic of what it means to be an effective leader and/or manager in the planning profession.

For example, CP&M Division Secretary/Treasurer Joshua Clements facilitated a “Planning Directors Roundtable” session at the Wisconsin Chapter Conference in October 2018, sponsored by the Division. In 2017, Clements served as the welcoming keynote speaker at the Wisconsin Conference leading a session entitled “The Role of Planners as Leaders” with over 125 attendees. One of the Division programming activities is creating example conference sessions and activities that members may easily customize for State conferences.

8. **Elections**

Division elections were held in 2018 with each of the three officers running unopposed.

During the 2018 Annual Meeting, those attending discussed examining the bylaws and leadership structure of other Divisions, particular those recognized as “high performing”, with the potential to create new elected or appointed positions in order to more effectively carry out the mission and programs of the Division.



9. **Financial Report**

The Division's FY2018 balance sheet reflects cash-on-hand of \$16,305.54, a net balance increase of \$2,945.87 since the previous year. Revenue from membership exceeded budget by \$1,213.85, travel costs for the Division Chair was under budget by \$431.12, and annual business meeting expense was under by \$60.64. The Division has not yet begun paying for the email marketing software that was budgeted for \$400. The Division's FY2018 adopted budget projected a loss of \$1,800, thus the Division exceeded expectations on this metric.

The 2019 Budget reflects an anticipated net operational deficit of \$2,400, or 34% of budgeted dues revenues. This is due in part to continued conservative budgeted dues revenue (\$1,213.85 less than actual FY 2018).

The Division continues to explore opportunities expand revenue. This is a struggle as our focus is municipal planners, and as such our sponsorship opportunities from Division Members and/or their employers for activities such as our newsletter or reception/program are limited. We are working to determine how we can expand revenue through targeted recruitment of new Division members, webinars, fee-supported programs at the Annual Conference, and support for a future email newsletter.

The Division supports several initiatives that entail utilizing Division funds:

As briefly described in #7 above, the Division has supported the creation and ongoing programing of the **Planning Leadership Institute** and the **Planning Management Institute**. The 2019 Division budgeted of \$2,500 continues the 2018 level.

Historically, the Division supported **Community Action Planning Teams** to respond to special requests for assistance by planning departments and organizations facing challenges concerning leadership and/or management. Typically, this has been conducted by senior members of the Division who respond to a request by conducting background research and preparation and conduct an impactful 1-2 day "visit" to evaluate conditions. However, APA has launched its own Community Assistance Team platform that has, in effect, taken over this effort. A total of \$1,250 has been budgeted for this activity in the 2019 budget year. No project was undertaken during the 2017 or 2018 budget period. Division support for this program will need to be reevaluated in future years.

The Division budgets \$150 to participate in APA-Ohio webcast series.

The Division may engage in other targeted program activities, such as supporting State Conference activities that are not presently planned or budgeted.

See Financial Report Spreadsheet, enclosed.

10. **By Laws**

Division leadership is reviewing and potentially updating our By-Laws. Proposed modifications are expected to be presented for consideration at the 2019 Division Annual Meeting.



11. **Division Council Meeting Minutes**

(See Attachments)

12. **APA Development Council**

The Division has been active in the Division Council. As chair of the City Planning and Management Division, Mr. Graves has attended the Division Council meetings during the National Planning Conference each of the past three years and Fall Leadership Conference the past two years. The Division has been involved in leadership discussions along with the APA Board. The Division continues to be involved with the APA Board and Leadership Council.

13. **Division Challenges**

The Division continues to actively recruit volunteers to contribute to developing and delivering Division activities and prepare for future succession. Planning Directors and other members who are actively seeking professional development opportunities are the typical volunteer. Given the typical nature of these roles, it is challenging to recruit volunteers with consistent and stable time commitment, including for key leadership opportunities.

14. **Shout It From the Mountain**

The Division has made strides in the past 3 years. With new leadership we have developed a strategic plan focusing on providing more information to members and responding to the changing ways that members are utilizing and accessing educational content and networking. The Division will continue to play an active role in diversity conversations within APA and pursue a more active role in this effort.

Since 2005 the Division has supported the Planning Leadership and Planning Management Institutes (and their predecessors) at the National Planning Conference, utilizing Division funds and volunteer time. These institutes celebrated their 14th year at NPC in New Orleans with large groups participating in each training. Over 450 planners have graduated from these institutes, ranging from big city and metro directors, county and rural planners, private practice and state/federal agency staff from nearly every state and six countries. The Division is working to improve and expand on these crucial areas of planning practice: effective and transformative leadership as community change agents, and management of diverse planning practices in rapidly changing community environments.

CITY PLANNING & MANAGEMENT DIVISION
FY2018 Financial Report (10/01/2017 - 09/30/2018)
FY2019 Proposed Budget (10/01/2018 - 09/30/2019)

Appendices A, B, D

TYPE	Funds Available 09/30/2017	Funds Available 9/31/2018
Checking	\$13,359.67	\$16,305.54
Other	\$0.00	\$0.00
Total	\$13,359.67	\$16,305.54

REVENUE	Description	FY2018 Budget	FY2018 Actuals as of 09/31/2018		Adopted Budget FY2019
				Subtotal	REVENUE
Dues	Q1 (trf in December)	\$1,750.00	\$1,651.35		\$1,750.00
	Q2 (trf in March)	\$1,750.00	\$2,860.00		\$1,750.00
	Q3 (trf June)	\$1,750.00	\$1,365.01		\$1,750.00
	FY2018 Q4 (trf September)	\$1,750.00	\$2,337.49		\$1,750.00
	Dues Revenue	\$7,000.00		\$8,213.85	\$7,000.00
	Other Revenue	\$0.00		\$0.00	\$0.00
	TOTAL REVENUE	\$7,000.00		\$8,213.85	\$7,000.00

EXPENSES	Description	Amount	Subtotal	EXPENSES	
Communications/Newsletter	Email Marketing	\$400.00	\$0.00	\$1,000.00	
	Printing	\$0.00	\$0.00	\$0.00	
	Handling	\$0.00	\$0.00	\$0.00	
	Postage	\$0.00	\$0.00	\$0.00	
	Newsletter / Communication Expense	\$400.00		\$0.00	\$1,000.00
Annual Business Meeting	Refreshments	\$500.00	\$439.36	\$500.00	
	Printing	\$0.00	\$0.00	\$0.00	
	Postage	\$0.00	\$0.00	\$0.00	
	Other	\$0.00	\$0.00	\$0.00	
	Annual Meeting Expense	\$500.00	\$439.36	\$439.36	\$500.00
Travel - Division Chair	APA 2018 National Conference	\$2,000.00	\$2,600.99	\$2,000.00	
	APA Fall 2018 Leadership Meetings	\$2,000.00	\$968.80	\$2,000.00	
	Other	\$0.00	\$0.00	\$0.00	
	Travel Expense	\$4,000.00		\$3,569.79	\$4,000.00
CP&M Division Programs & Initiatives	Community Planning Action Teams	\$1,250.00	\$0.00	\$1,250.00	
	Planning Management Institute	\$1,000.00	\$1,000.00	\$1,000.00	
	Planning Leadership Institute	\$1,500.00	\$1,500.00	\$1,500.00	
	Webcasts	\$150.00	\$150.00	\$150.00	
	Other Expense	\$3,900.00		\$2,650.00	\$3,900.00
	TOTAL EXPENSES	\$8,800.00		\$6,659.15	\$9,400.00

Revenue over (under) Expenses for reporting period:	-\$1,800.00		\$1,554.70	-\$2,400.00
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Submitted by: JOSHUA CLEMENTS, AICP Secretary/Treasurer
Date: 2018 December 02