



APA-NC Legislative Committee

2023 Strategic Plan

APA-NC MISSION STATEMENT:

APA-NC promotes equitable, healthy, and prosperous communities across North Carolina through professional planning leadership, advocacy, and education.

This document is the strategic plan for the APA-NC Legislative Committee. The Legislative Committee is a standing committee of the North Carolina Chapter of the American Planning Association (APA-NC). We work with planning professionals across the State to promote beneficial planning-related legislation in North Carolina. This strategic plan identifies the Legislative Committee’s vision, goals, objectives, and anticipated actions as part of promoting beneficial planning-related legislation in North Carolina. The plan was endorsed by the APA-NC Executive Committee on December 5, 2019, and guides the Legislative Committee’s work program through 2025.

The initial version of this Plan was prepared with the assistance of numerous planners throughout North Carolina, the legislative experts in the national office of the American Planning Association, and with a grant from the Chapter President’s Council of the American Planning Association. The Committee thanks everyone who assisted in the preparation of this document and helped to collect the information upon which it is based. The document that follows is an update of the original Plan and was completed based on input and discussion in 2023.

Questions about this document should be directed to the Chair of the APA-NC Legislative Committee, who may be reached through the Chapter’s website at www.northcarolina.planning.org.

As part of the updates made to the plan in 2023, the Appendix has been removed and remains available for review on the Legislative portion of the APA-NC Chapter’s Website. It can also be obtained by contacting any member of the Legislative Committee. The Appendix includes the results of the APA-NC Legislative Committee member survey completed in March 2019. The Appendix also includes a brief summary of best practices from legislative committees across eight other states. There is also a brief history of the APA-NC Legislative Committee from 1985 to 2018.

Contents:

Strategic Plan	
Introduction	2
Work Program Tasks	5
Vision	6
Goals	7
Objectives	8
Actions	10

See the APA-NC’s webpage for the Appendix to this Strategic Plan



PART 1: INTRODUCTION

STRATEGIC PLANNING DEFINED: *A systematic process of envisioning a desired future, and translating this vision into broadly defined goals or objectives and a sequence of steps to achieve them.*

This strategic plan is a written description of where we (the APA-NC Legislative Committee) are today, where we want to go, and how we will get there.

It identifies a **Vision Statement**, or the Committee’s vision for its short-term future - within the next 3-5 years (to 2025) from the date the Plan was developed. The Vision Statement is the “what” and the “why” for everything we do.

This plan sets down the Committee’s **Goals**, or how we will achieve our vision. The number of goals has been kept to a manageable number so that we remain focused on our key priorities.

The plan lists our **Objectives**, or the things we hope to do in order to reach our goals. Care has been taken to ensure each objective is specific, measurable, and realistic given prevailing conditions and our available resources.

The objectives in the plan are further supported by a listing of the **Actions** we intend to take in order to achieve our objectives. We are a volunteer organization, and as such, care must be taken to ensure we have the bandwidth to successfully complete the actions we undertake. As such, no timeline has been provided with the suggested suite of actions. Instead, this plan provides a short list of the key actions the Committee expects to undertake each calendar year. The list will be revisited and updated each year, as appropriate. The anticipated list of actions for the 2023 Committee work program is listed at the end of this Introduction.

WHERE WE ARE TODAY

The North Carolina Chapter of the American Planning Association has a long history of maintaining a Legislative Committee. The Chapter has benefited from a core group of dedicated planners who track proposed legislation and keep Chapter members informed about bills under consideration by the North Carolina General Assembly. For more than 30 years, planners from across the State have donated their time and energy to the Chapter’s Legislative Committee, and the Chapter has employed a part-time lobbyist for almost as many years.

Despite our long history and dedicated volunteers, we continue to face some fairly significant challenges in the legislative arena. In 2010, control of both houses of the North Carolina General Assembly was secured by the Republican Party – for the first time since 1870. In 2012, the Republican Party added enough seats in the General Assembly to establish veto-proof majorities in both houses. This condition has continued off-and-on since. In 2023, the majority party held super majorities in both chambers.

The changes since 2010 demonstrate a somewhat more conservative stance in the General Assembly, and many pieces of planning-related legislation have relied on a stricter interpretation of the Dillon’s Rule foundations in the State’s Constitution. Bills that limit local autonomy in the realms of design control, environmental protection, or local government finance have become much more typical than in the years prior to 2010.

The ability of the planning profession to participate in discussions or debates about planning-related legislation in the General Assembly also appears to have waned in the years since 2010. By and large, as a profession, we lack contacts and “insider” status in the General Assembly. We do not have the financial wherewithal to make campaign contributions or maintain premier representation during legislative interaction. We rely solely upon volunteers, many of whom have regular jobs that take priority over legislative advocacy efforts.

Our recent legislative advocacy efforts have been largely comprised of action alerts on proposed legislation that are sent to Chapter members with requests for members to undertake legislative advocacy on their own. In some instances, we have joined coalitions with partners (like the League of Municipalities or Scenic America) to advocate for or against individual pieces of proposed legislation. We have taken opportunities to testify to legislative committees on proposed legislation and had opportunities to provide information to the media in cases where controversial legislation is being considered. Despite these efforts, it has been difficult to discern the net impact of our advocacy, either for or against pending legislation over the last decade. At best, our efforts have been described as “possibly helpful” and at worst, our efforts have “had zero impact” on legislative outcomes (quotes are provided from the Chapter’s lobbyist).

One recent technique that shows promise is for the Legislative Committee to coordinate assembly of resolutions of support or opposition to a particular piece of legislation from various local governments across the State and then forward the set of resolutions as a group, along with talking points or thoughts about a bill, to a particular House or Senate committee who is considering the bill. The Legislative Committee has pursued this strategy several times over the last few years, and in each instance, some sort of change to the legislation took place afterwards (though we know nothing about a causal relationship between the Legislative Committee’s transmittal and the outcome of the bill).

There are also several examples of positive interactions between the Chapter and elected officials at State and local levels. NC Great Places Award ceremonies during Town Hall days at the Legislature are one example where planners have built good will and positive recognition with elected officials at State and local levels. The Chapter’s recent Planning for Prosperity initiative is another example where planners demonstrated their ability to provide important data and insights on growth and development to elected officials in ways that were positively received. Individually, planners across the State maintain positive and beneficial relationships with their locally-elected representatives in the General Assembly.

What these initiatives and efforts have shown us is that it is possible to forge positive relationships with Legislators, and that these relationships can be established by us simply doing what we do best: promoting awareness, and providing data and interpretation from a neutral position. Effective advocates have long understood that politics is about relationships, and success in the political realm depends upon construction and maintenance of beneficial relationships between involved parties. Close, personal contacts with elected officials that yield positive outcomes are likely our optimal approach to legislative success.

One area that the Committee has identified as a means of generating more contact and interaction with Legislators in 2024, while focusing on our core mission, is to request the talking points or rationale for a proposed bill from its sponsor(s), and including that information in the Committee’s tracking form. The hope here is to increase both contact with legislators and understanding of their perspectives. We hope to try this strategy in 2024 and assess its value at the end of the 2024 legislative session.

WHERE WE WANT TO GO

The remaining pages of this document explain where we, as a Committee, want to go in the coming years. In short, the Legislative Committee seeks to continue to support Chapter members and the profession generally through continued tracking of pending legislation. We hope to expand our role as facilitators of legislative adaptation – in other words, lend our resources and expertise in ways that help North Carolina communities adapt to and benefit from changes in planning-related legislation after they are adopted. We seek to enhance our role as neutral policy advisors and build positive, non-partisan relationships with elected officials at all levels through the provision of accurate and relevant information. We want to enhance the public’s understanding of the beneficial role planning plays in the establishment and maintenance of desirable places to live. Finally, we want to carefully consider the adoption of policy positions on proposed legislation if such action might interfere with the establishment of a reputation as a source of neutral, objective information for elected officials or the public.

The following Vision Statement describes the vision for the Legislative Committee in the near-term (the next 3 to 5 years). The Committee’s vision statement forms the basis for its goals, objectives, and actions over the coming years.

WORK PROGRAM TASKS

The following four activities comprise the Legislative Committee's action for 2023. References to Action Numbers refer the action summary table in Part 5 of this plan. The Committee may revisit this work program at any time during the year based on changed conditions or resources. Changes in the work program will be documented in this plan. The Committee will provide a report at the end of the year on its progress towards accomplishing the following actions.

Questions about the Committee's work program can be directed to the Legislative Committee Chair, who's contact information is available under the Legislation tab at www.northcarolina.planning.org.

APA-NC Legislative Committee Work Program for 2023

- Item 1:** Continue to track and report on pending legislation during twice-monthly chapter-wide conference calls with in-depth bill review and interpretation.

- Item 2:** Begin to interact with Legislators through requests for their talking points and the rationale for proposed legislation (to include in the Committee's tracking documents).

- Item 3:** Prepare and utilize a new priority ranking system for pending legislation that assigns a priority between 1 & 3 for pending legislation and focusing our advocacy resources with the General Assemble only on Priority 3 bills (in coordination with the APANC Executive Committee before advocacy activity commences).

- Item 4:** Explore the potential for more collaboration with the North Carolina Association of Zoning Officials (NCAZO).

PART 2: LEGISLATIVE COMMITTEE VISION STATEMENT

VISION STATEMENT DEFINED: *A declaration of an organization's desired future that is intended to guide its internal decision-making. A vision statement provides the basis or framework for a strategic plan.*

The following statement describes the Legislative Committee's vision for its short-term future - within the next 3-5 years (to 2025). The Vision Statement is the "what" and the "why" for everything we do.

The APA-NC Legislative Committee will inform and equip North Carolina planners to better participate in the legislative process and build lasting relationships with strategic partners and the General Assembly in pursuit of beneficial planning legislation. We will serve as an objective source of information on the anticipated impacts of proposed legislation, and will raise awareness of the value of planning in North Carolina communities. We will provide assistance to planners and local governments in adapting to changes in planning-related legislation.

PART 3: LEGISLATIVE COMMITTEE GOALS

GOALS DEFINED: *An observable and measurable end result that is achieved through the pursuit of one or more objectives over a fixed timeframe. Goals are how an organization achieves its vision.*

The following is a list of goals for the APA-NC Legislative Committee for the next 3-5 years (to 2025) based on the Vision Statement described in Part 2. The Vision Statement is our desired future, and the goals are how we will achieve that future. The number of proposed goals has been kept purposefully short to ensure precise focus and in recognition of available resources. Part 4 of this plan lists the objectives or the means by which we will accomplish each goal.

Goal 1: Inform and equip North Carolina planners to better participate through APA-NC Legislative Committee in the legislative process.

Goal 2: Raise awareness of the need for and value of planning with members of the General Assembly and the public.

Goal 3: Increase the Chapter's involvement in the preparation and consideration of proposed planning-related legislation.

Goal 4: Make an effort to assist planners and local government in understanding potential outcomes of pending planning-related legislation.

PART 4: STRATEGIC PLAN OBJECTIVES

OBJECTIVES DEFINED: *An objective is a specific result that an organization aims to achieve within a time frame and with available resources. Objectives are basic tools that underlie all planning and strategic activities. Objectives are how an organization achieves its goals.*

Objectives are the things we will do to reach our goals. Each goal is comprised of one or more individual objectives. Objectives should be ‘SMART’ – specific, measurable, achievable, realistic, and time based. The following table describes the objectives associated with each goal listed in part 3 of this plan. Most of these objectives are on-going, or do not necessarily include an end date. Periodic review and revision of these objectives by the Committee is warranted as conditions change.

PLAN GOAL	OBJECTIVES
1. Inform and equip North Carolina planners to better participate in the legislative process	A. Track pending legislation
	B. Prioritize and summarize most impactful pending legislation on an on-going basis
	C. Provide regular updates to Chapter membership on pending legislation
	D. Supplement action alerts and talking points documents with more details and follow-up
	E. Solicit input from Chapter membership on legislative objectives and priorities on an ongoing basis
	F. Furnish tools and information to promote grass roots advocacy by individual Chapter members
2. Raise awareness of the need for and value of planning with members of the General Assembly	A. Prepare issue briefings on pending legislation or planning-related issues as requested or as needed
	B. Facilitate partnerships with other APA-NC committees to prepare outcome-based descriptions of the value of planning and furnish these descriptions on Chapter platforms or as requested
	C. Interact with legislators and their staffs where possible via in-person meetings, telephone, or e-mail
	D. Organize an advocacy day at the General Assembly or in some other appropriate forum
	E. Explore a Legislative Committee booth at the NCLM conference

PLAN GOAL	OBJECTIVES
3. Increase the Chapter's involvement in the preparation and consideration of proposed planning-related legislation	A. Formalize an APA-NC Planner's Advocacy Network to help manage ongoing tasks and allow for varying levels of member participation based on interest, expertise, and availability
	B. Express the Chapter's desire to participate in or provide information to special committees, commissions, or panels formulated by the Governor or the General Assembly on planning-related issues
	C. Reach out directly to individual legislators and their staffs with offers of informational support
	D. Participate in outreach efforts to General Assembly members with strategic and coalition partners
	E. Provide written or oral testimony on proposed legislation, as appropriate
	F. Explore potential for targeted use of a lobbyist as Chapter funds permit
4. Assist planners and local governments in adapting to changing legislation	A. Conduct a session focused on compliance with new planning legislation during the APA-NC annual conference
	B. Prepare and publicize short information sheets on means of complying with recently changed planning legislation
5. Regularly report our progress towards achievement of plan goals	A. Reconstitute "Assembly Line" blog or other monthly written status update on legislative issues
	B. Ensure annual Committee progress reporting whether as a stand-alone document or as part of the Chapter's annual status report

PART 5: ACTIONS

ACTIONS DEFINED: *Actions are concrete steps or activities that are undertaken in pursuit of an objective. Actions are sequential and may have a completion date or may be ongoing. An important part of each action is a period assessment of the action’s effectiveness.*

This section of the plan describes the anticipated actions the Committee will undertake to meet the plan’s objectives. The list below was developed as part of the initial plan development process, and may also be amended on an annual basis. The long list is aspirational, and it includes the full suite of actions the committee seeks to accomplish through the course of the Strategic Plan. However, achievement of listed actions are highly dependent upon conditions at the time and the Committee’s resources. The Committee will review the actions in the long list each year as part of developing that year’s short list of anticipated actions.

FULL LIST OF ACTION ITEMS

The table below includes the most up-to-date list of action items identified by the Legislative Committee in pursuit of the Committee’s goals and objectives. This list provides the basis for the Committee’s annual work program (subject to prevailing conditions and available resources). The Committee will review and revise this list each year as part of establishing the annual work program for the year.

Objective	Associated Actions	Comments
Goal 1: Inform and equip North Carolina planners to better participate in the legislative process.		
A. Track pending legislation	Prepare a new tracking form (in MS Word) in 2023 for legislation	
	Maintain updated bill tracking spreadsheet	
	Continue to post updated tracking form on Legislative Committee tab of the APANC’s website during legislative sessions	
B. Prioritize and summarize most impactful pending legislation on an on-going basis	Establish a new priority ranking system for pending planning-related legislation	“Priority 1” bills are those pending bills that are planning related
	Elevate discussion of “Priority 2” bills by providing opportunities for extra discussion with chapter members	“Priority 2” bills are pending bills that deserve greater discussion, as determined by Legislative Committee members or by Chapter member requests
	Coordinate with the Executive Committee in formulating a response to “Priority 3” bills	“Priority 3” bills are ones that pre-empt local control, affect planner’s employment, or include unfunded mandates
	Prepare a ‘policy guidance’ document that helps clarify what bills receive what priority	

Objective	Associated Actions	Comments
	status and the process the Committee will follow when a Priority 3 bill is identified	
C. Provide regular updates to Chapter membership on pending legislation	Conduct and record 30-minute conference calls with interested members twice per month (during session)	
	Post links to call recordings on the planners' listserv	
Goal 2: Raise awareness of the need for and value of planning with members of the General Assembly.		
A. Encourage more regular contact with bill sponsors	Reach out to obtain bill sponsor talking points and rationale for proposed legislation and include this information in the tracking form updates	
B. Explore a Legislative Committee booth at the NCLM conference	Determine cost and timing	
	Discuss relevance with Executive Committee	
Goal 3: Increase the Chapter's involvement in the preparation and consideration of proposed planning-related legislation.		
A. Reach out directly to individual legislators and their staffs with offers of informational support	As part of collection of talking points or bill rationale materials, offer to engage in discussion of potential bill outcomes and potential revisions, if appropriate	
	Conduct meetings as possible	
	Follow up as appropriate	
B. Provide written or oral testimony on proposed legislation, as appropriate	Provide testimony as appropriate in the sole discretion of Chapter leadership	This would take place on Priority 3 bills and in coordination with the Chapter's Executive Committee
C. Explore potential for targeted use of a lobbyist	Explore potential for lobbyist-sharing with related organization	
	Secure funding stream, if appropriate	
	Prepare lobbyist work program, if appropriate	
	Execute contract, if appropriate	
Goal 4: Assist planners and local governments in adapting to changing legislation.		
A. Conduct a session focused on options for obtaining compliance with new planning legislation during the APA-NC annual conference	Identify relevant legislation	
	Prepare presentation	
	Submit session proposal	
	Follow up and review for ongoing inclusion in work program	
B. Consider building a closer relationship with NCAZO and determining ways in which the	Meet with NCAZO officials at their mid-winter conference	

Objective	Associated Actions	Comments
Legislative Committee can interface with certified zoning officials to track and adapt to legislation	Draft a short memo of coordination for consideration by both bodies	
Goal 5: Regularly report our progress towards achievement of plan goals.		
A. Reconstitute “Assembly Line” blog or other monthly written status update on legislative issues	Continue drafting monthly blog posts	
	Reach out to other blog content creators for cross-posting materials	
B. Incorporate a robust approach to progress reporting	Explore preparing an annual stand-alone Committee report for inclusion in the Chapter’s report	Due dates?
C. Update and organize the Committee’s basecamp site	Form a sub-group and bring some order to the files that have never been well organized	