



# Four-Year Plan for Chapter Work and Development

2018-2022

Adopted February 9, 2018



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## Four Year Plan for Chapter Work and Development 2018-2022

### Introduction

The following document is intended to guide the work plan and development of the North Carolina Chapter of the American Planning Association over the next four years, beginning in January of 2018. The purpose of the plan is to identify priorities and set the strategic direction for the many activities and initiatives undertaken by the Chapter and its committees, both ongoing and new. The North Carolina Chapter (APA-NC) has a long history of undertaking strategic plans, and past plans have helped create many initiatives, some of which remain ongoing and relevant to the Chapter's mission. The most recent strategic plan covered a three year time period from 2014 – 2017. Consistent with recently-adopted guidance from the Chapter President's Council, this plan has a four year time horizon, corresponding to the four year staged term of the Chapter President. In order to keep the plan up to date and relevant, it will be revisited and updated on a two year cycle, with each update conducted during the first year of the new Chapter President's term. This way, each new President has the opportunity to lead the Chapter through the update process.

### Background

Long-range planning is now a required activity for all APA chapters under the recently-adopted Chapter Performance Criteria. Chapters must plan both their work plan and their development as a chapter over a four- to five-year time horizon to remain in good standing with APA national. Historically, APA-NC has used an annual work plan in conjunction with a longer-range strategic plan. In constructing a long-range plan, because the potential activities of the chapter are limitless, the identification of strategic priorities can provide focus for an achievable scope of work.

The creation of the plan was initiated at the annual retreat of the APA-NC Executive Committee. Held on August 18, the bulk of the retreat agenda was devoted to a brainstorming session to generate ideas for an updated mission statement and identify strategic priorities to form the foundation of a long-range work plan. The discussion was facilitated by planning consultant and landscape architect Rodney Swink. Key words for the mission statement were discussed, and three strategic priorities were identified. The three strategic priorities are described in detail in a subsequent section.

The Chapter President and consultant worked to take the three priorities and identify specific initiatives and activities to implement each one. Roles and responsibilities, including existing committees, are clearly defined. Five potential mission statements and a detailed outline were circulated to the

Executive Committee for review and comment. These same documents with revisions were presented to attendees at the annual Chapter Meeting in Greenville for feedback. Based on this input, a new mission statement was crafted incorporating the best ideas from several options. This mission statement and a final outline were presented to the executive committee at their October meeting. Having received the endorsement of the committee, the outline was fleshed out to form this report, which was adopted by the Committee by unanimous vote at their December meeting.

## 2014 – 2017 Strategic Plan

The prior strategic plan, which is scheduled to sunset this year, launched two new initiatives: Planning for Prosperity (PfP) and a Chapter-level CPAT program (Planning Assistance Resource Team, or PART). PfP has held several high-profile events around the state covering the preferences of the millennial generation, small-scale manufacturing, and farm-to-table economics. PART successfully completed one assignment but became dormant due to insufficient resources. It is set to relaunch as NCPAT in 2018 with its own committee. Other successful efforts from the strategic plan included greater leveraging of Great Places in NC and landing two Plan4Health grants to fund health-focused planning work by the Centralina Council of Governments.

## Mission Statement

APA-NC has long had a statement of purposes that has served as the mission statement for the Chapter. While comprehensive, this purpose statement is too long to commit to memory, and therefore has not been widely used at meetings or during presentations. The current statement of purposes, which remains unchanged, is as follows:

*The purposes of the Chapter are to facilitate the individual participation of members of the American Planning Association in the affairs of the Association and to further the purposes of the Association in North Carolina. The purposes of this Chapter shall be to:*

- a. *provide leadership in the development of sound planning policies and practices in North Carolina;*
- b. *provide continuing planning education to foster the growth of professional planners' knowledge and skills;*
- c. *foster the growth of professional identity;*
- d. *increase awareness of the planning process, the planning profession and the benefits that both can bring to the citizens of North Carolina, and*
- e. *advance the art and science of planning within the Chapter area.*

Desiring a short and memorable mission statement that can be more easily memorized and used as a touchstone for the Chapter's work, the Executive Committee took on the task of crafting a new Mission Statement at the August retreat. The following mission statement was refined through input from the Executive Committee and participants at the annual Chapter Meeting, and was adopted at the Executive Committee meeting on October 13.

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

## Ongoing Initiatives that Support the Mission

In addition to new priorities and initiatives described later in this plan, the Executive Committee has committed to continuing the following ongoing initiatives and programs for the next two years. While each initiative remains relevant, there are opportunities to align them with the strategic priorities presented in the next section.

### Great Places in North Carolina

The NC chapter launched the first chapter-level Great Places programs in 2011 and it has been a source of positive impact each year. By awarding communities for the end result of creating a “great place,” the initiative is able to highlight the good that the planning profession does, from building rehabilitations to placemaking to the transformations of main streets and downtowns.

While the program remains successful, it must continue to refresh itself to maintain momentum by recognizing new places and categories. The Great Main Street and Main Street in the Making categories are mainstay awards that work for communities of all sizes. Rotating categories for greenways, public spaces, and places for healthy living have recently brought a variety of new communities to the initiative. In fact, Pitt County, which won the NC Great Place for Healthy Living award in 2016, won a national Great Places award in 2017.

Future awards should give weight to communities that can highlight ways their places further the chapter mission, ongoing initiatives, and the strategic themes described below. For example, applicants could highlight how their places promote healthy living, or have shown resilience in the face of adverse events. The Great Transformation category, added in 2017, could help highlight these stories.

### Plan4Health NC

Plan4Health NC started from an APA program designed to leverage planner’s roles as collaborators and conveners to improve public health outcomes in communities throughout the nation. Two grants funded: placed-based work in Charlotte by the Centralina Council of Governments (2015 – 2017); and statewide capacity building efforts (2017).

In the original, grant-funded 6 months of the Planners4Health project, APA-NC established goals in five categories of activities:

1. APA-NC Presence/Framework: create a standing steering committee, sessions at state conference, Great Places-Healthy Community Category, professional recognition, participation in the Healthy Communities Collaborative, APA-NC website content, and newsletter articles and blogs.

2. Statewide Partnerships/Collaboration: APA-NC and APHA joint activities and chapter dues, identification of local leaders and activities, regional workshops and technical assistance, development of common language and goals, and statewide collaborative.
3. Resource Development: NC version of the Tale of Two Zip Codes Video, statewide health and social determinants of health mapping, topic-based toolkits, presentation slide decks, and one-pagers.
4. Marketing Efforts: official name and logo, newsletter articles and blogposts, Carolina Planning Journal, presentations at conferences, social media, and website development.
5. Conferences/Stakeholder Roundtable: conduct the assessment checklist, regional roundtables, online survey, presentations at national and state conferences, and Planning for Healthy Communities Conference.

Plan4Health NC launched in 2017 as a chapter initiative with a standing steering committee, going beyond place-based projects to bring a broader health focus to APA-NC. Over the next three years this steering committee will continue the activities listed above with a focus on resource development and strengthening relationships with partnering organizations.

### **North Carolina Planning Assistance Team (NCPAT)**

NCPAT is a program that provides highly-qualified, low-cost planning expertise to communities in North Carolina that lack resources to tackle small-scale and technical planning challenges. The chapter began the program in 2013, as the Planning Assistance Resource Team (PART). In 2017, the APA-NC executive committee decided to reestablish this program as the improved NCPAT.

NCPAT will encourage qualified planners and members of allied professions to volunteer their time to support local governments, development associations, non-profit organizations, and tribal governments in the state. These local organizations will be encouraged to submit technical questions or topics to the chapter's NCPAT committee on a rolling basis throughout the year. The NCPAT committee will select which requests will be met with NCPAT support, and the NCPAT committee will identify a few professionals from a pool of volunteers who best fit the nature of the technical request.

In addition to a rolling solicitation for technical assistance requests, the NCPAT committee will work with the annual conference host committee to identify opportunities for NCPAT assistance during the conference. Opportunities may include a hands-on activity in the conference host community, or it may allow for NCPAT volunteers to travel to a community nearby the conference. The goal is to host two NCPAT events annually, including an event coordinated with the conference.

NCPAT panel volunteers will be responsible for documenting their recommendations and delivering presentations to the community hosting the NCPAT team. Host communities will support the volunteers

by paying for travel expenses. Otherwise, the NCPAT team members will not receive any payment or honorarium for their technical assistance.

During the 2017 annual planning conference, a small group of planners convened to discuss options for the NCPAT program. Planners discussed ongoing needs in Eastern North Carolina in the wake of Hurricane Matthew. NCPAT will continue outreach to state emergency management experts to explore options for NCPAT to support communities impacted by Hurricane Matthew. The group of planners also discussed the idea of coordinating an NCPAT event with the annual conference. In 2018, the NCPAT committee will focus efforts to hosting a NCPAT event near Winston-Salem (host city for the 2018 conference).

The NCPAT committee has been formed, and committee co-chairs Lauren Blackburn and Dick Hails will deploy a survey to solicit requests for technical assistance from communities and organizations in the state. The committee will advise the NCPAT program in 2018 and 2019 until the program is institutionalized as part of other state chapter programs. NCPAT will work with the APA-NC Section Leaders and the Professional Development committee to sustain the program beyond the first 2 years (2018-2019).

### **Planning for Prosperity**

A key initiative from the 2014 – 2017 Strategic Plan, Planning for Prosperity was conceived in response to the great recession and the changing political environment in NC. The focus of this program is on the intersection of economics and community planning, which remains relevant to the chapter mission and provides a unifying theme for regional and statewide event programming.

The goal of the program is to provide one major program per year based on a relevant theme.

### **Other Ongoing Programs Supporting the Mission**

Regular interactions between the Chapter and its membership are dependent on the work of several Chapter Committees. These committees provide information, recognition and training for planners.

#### **Communications**

The Communications Committee connects the members of the Chapter with newsletters, the Chapter web site, blogs and email contacts.

#### **Awards**

The Awards Committee administers the Marvin Collins Awards program and guides a jury in the recognitions of high quality planning projects.

## Sections

The Sections Committee brings planning activities and training closer to the planners throughout the State. Planner who may not be able to travel to the State or National conferences can meet closer to home.

### Young Planners Group

The Young Planners Group focuses on encouraging new membership and retention of newly graduated planners. The Committee attempts to form social and mentoring connections among emerging planners.

## Strategic Priorities for 2018 – 2022

### Affordable Housing

In communities around the state, housing costs are rising faster than incomes. Housing production slowed to a crawl during the Great Recession. Coming out of the recession, renters as a proportion of all households grew, and in many communities the pace of new rental construction could not keep pace. The result has been a significant increase in rental rates. Even in the for-sale-market, many cities have seen prices outstrip income growth. In hotter urban markets, the problem is most acute in specific geographies. Inner ring neighborhoods, once affordable due to their old housing stock, have seen a wave of rehabilitations, additions, and teardowns and rebuilds, dramatically raising the price of these older neighborhoods and displacing formerly naturally-occurring affordable housing (NOAH).

North Carolina communities lack the authority available in other states to implement solutions such as mandatory inclusionary zoning. Some communities contribute local tax dollars for affordable housing, but in many places this is either an excessive fiscal burden or a political non-starter. Attempts to build new affordable units through the Low Income Housing Tax Credit can run into neighborhood opposition.

APA-NC can serve as a resource for data, defining the problem and potential solutions that can be implemented in NC, as well as a source of advocacy for enhanced local authority. Many local governments in NC have done great work on this topic; their findings and best practices should be broadly shared. APA-NC can also work with partners to dispel myths about affordable housing, such as adverse impacts on property values or increases in crime, neither of which have been observed in rigorous studies.

### Resiliency

Extreme weather events and floods are becoming more common as the state feels the early impacts of climate change. Hurricane Matthew in October 2016 was the most significant flood event to hit the state since Hurricane Floyd in 1999. The Raleigh area was hit by historic flooding just a few months later in April 2017, not from a tropical storm, but from a low pressure system. Some parts of the state and the Southeast have seen multiple 100-year storm events over a period of two years. Over a year after the disaster, recovery from Hurricane Matthew remains an urgent priority in eastern North Carolina.

Planners have an important role to play in planning for both hazard mitigation and disaster recovery. Critical decisions about where and whether to rebuild, how to protect critical infrastructure, and how to relocate development out of harm's way, are all topics in which planners have important roles to play. APA has an entire division devoted to this topic: Hazard Mitigation and Disaster Recovery. APA-NC has 36 members in this division, making it the sixth most popular in the state (Transportation Planning is number one with 71 members).

## Diversity & Equity

NC is becoming more diverse with each passing year, but this diversity is not reflected within the planning profession. As of 2016, the State was about 63 percent white, 21 percent black, with the Hispanic/Latino population at 9.2 percent being the fastest growing ethnic group in the state. While statistics on the racial and ethnic makeup of APA-NC members are not available, any attendee at the North Carolina Planning Conference can see that hispanics/latinos and African Americans are not proportionately represented in the profession.

As a result, planners will often find themselves working with communities where they lack easy familiarity with the norms, culture, and language. Planners need tools and resources to effectively engage and plan with diverse communities. As the leading provider of professional education to North Carolina planners, APA-NC can play an important role in making relevant training available to its members, both at and outside of the annual conference.

The concept of equity needs to be more deeply embedded in the work of planners and the chapter. Ever since urban areas began their post-WWII decline, revitalization has been focused on place-based strategies to lure investment into areas suffering from disinvestment. In the new century, many urban neighborhoods are receiving so much reinvestment that displacement has replaced decay as the top concern, while other areas including rural places still struggle and increasingly seem left behind. Revitalization that is not broadly shared is not true revitalization. Planner's thinking and tactics need to evolve to match this new reality.

## Advancing the Strategic Priorities: Goals, Initiatives, and Actions

The following goals, initiatives, and actions are organized under the heading of each strategic priority identified in the prior section. For each action, a proposed timeframe for action within the four-year horizon is presented, along with the identification of the lead committee or individual who is responsible for implementation.

### Affordable Housing (AH)

**Goal: Position APA-NC as a leader and source of information and best practices on affordable housing statewide.**

**Initiative AH-1: Provide a clearinghouse for information on affordable housing.**

With this initiative, APA-NC would seek to augment rather than duplicate work already done in this field by the UNC School of Government. Leveraging the power and knowledge of our member base across the state, APA-NC will:

*Action AH-1.1: Create a webpage containing data and links to housing resources statewide.*

*Action AH-1.2: Compile a list of case studies and best practices from communities around the state.*

**Initiative AH-2: Advocate for new tools for affordable housing at the local and state level.**

While the current legislative climate is not conducive to major new initiatives like inclusionary zoning authority, there may be more modest yet meaningful policy changes which could find traction, everything from zoning reform to new funding sources. APA-NC will:

*Action AH-2.1: Task the Legislative Committee in reaching out to sympathetic legislators to start a dialog on housing.*

*Action AH-2.2: Work with the UNC School of Government to identify politically-feasible affordable housing tools and policies that might be appropriate for communities in NC.*

*Action AH-2.3: Identify potential partners who share affordable housing interests to work with to build support for new public policies.*

## Resiliency (R)

**Goal: Increase chapter involvement in hazard mitigation and disaster recovery.**

**Initiative R-1: Get more NC planners to become members of the Hazard Mitigation and Disaster Recovery division of APA.**

This division is currently the seventh most popular in NC with 36 members, but given the importance of the issue in the state, it is an appropriate target for expansion. The division can play a key role in stimulating discussion and action through networking and education. APA-NC will:

*Action R-1.1: Work with existing division members to sponsor socials, meetups, and other networking events at the conference and elsewhere to get more planners acquainted with the division.*

*Action R-1.2: Work with existing division members to increase the number of conference session proposals covering hazard mitigation and disaster recovery.*

**Initiative R-2: Involve planners in specific disaster recovery planning efforts, starting with communities still recovering from Hurricane Matthew.**

Over a year later, communities in eastern NC are still struggling with recovery and rebuilding, and this can be expected to continue for many more years. APA-NC members can add significant value to helping make decisions that rebuild these communities in a more resilient way. APA-NC will:

*Action R-2.1: Perform at least one Matthew-focused NCPAT undertaking in 2018.*

*Action R-2.2: Assist a Matthew-impacted local government(s) in applying for a national CPAT in 2018.*

*Action R-2.3: Communicate with NC Emergency Management, FEMA, and other disaster recovery leaders (i.e., Gavin Smith) about the availability of APA-NC members to assist in recovery planning.*

*Action R-2.4: Create a document that provides guidance and establishes an APA-NC protocol for responding to future disasters.*

*Action R-2.5: Identify potential partnerships with other agencies and organizations seeking to provide information and support for programs and policies encouraging the development of resilient communities.*

## Diversity & Equity

**Goal: Promote diversity in the profession and equity in planning practice.**

**Initiative DE-1: Equip NC planners with the awareness and skills necessary to work with diverse communities in developing plans.**

While increasing diversity within the profession will take time, improving planners skills in collaborating effectively with diverse communities can and should happen in the near term and be part of the Chapter's ongoing work. APA-NC will:

*Action DE-1.1: Commit to providing diversity and equity-focused sessions at future NC Planning Conferences.*

*Action DE-1.2: Sponsor learning and training opportunities around the state on how to effectively facilitate planning exercises in diverse communities, including lectures, courses, and webinars.*

**Initiative DE-2: Increase outreach to secondary schools to introduce minority students to the profession of planning**

Outreach to college students is great, but many if not most were unaware of the existence of the profession when choosing a major. Targeting more outreach to secondary schools provides an opportunity to introduce students to the profession at a younger age and introduce them to the possibilities of a career in planning. APA-NC will:

*Action DE-2.1: Create a standard set of materials and recruit volunteers to give guest appearances at high schools and other secondary schools around the state.*

**Initiative DE-3: Provide networking opportunities for planners of color.**

Currently, the only Chapter activity in this space is the Diversity Mixer at the NC Planning Conference. Adding additional events for networking at the conference and throughout the year will provide more opportunities for sharing experiences and learning. APA-NC will:

*Action DE-3.1: Hold social gatherings, brown bag lunches, and conversation hours with planners of color for the purpose of networking.*

*Action DE-3.2: Reposition the Diversity Mixer as a free social event that coincides with the NC Planning Conference and invite all members to attend. This social event should include a experience that focuses on ethical and cultural issues.*

Initiative	Action	Year 1 – 4	Committee
<b>Affordable Housing</b>			
<i>Goal: Position APA-NC as a leader and source of information and best practices on affordable housing statewide</i>			
Initiative AH-1: Provide a clearinghouse for information on affordable housing	Action AH-1.1: Create a webpage containing data and links to housing resources statewide	2	New committee

<b>Initiative</b>	<b>Action</b>	<b>Year 1 – 4</b>	<b>Committee</b>
	Action AH-1.2: Compile a list of case studies and best practices from communities around the state	2	New committee
Initiative AH-2: Advocate for new tools for affordable housing at the local and state level	Action AH-2.1 Task the Legislative Committee in reaching out to sympathetic legislators to start a dialog on housing	2	Leg Comm
	Action AH-2.2 Work with the UNC School of Government to identify politically-feasible affordable housing tools and policies that might be appropriate for communities in NC	3	Leg Comm
	Action AH-2.3 Identify potential partners who share affordable housing interests to work with to build support for new public policies	2	New committee
<b>Resiliency</b>			
<i>Goal: Increase chapter involvement in hazard mitigation and disaster recovery</i>			

<b>Initiative</b>	<b>Action</b>	<b>Year 1 – 4</b>	<b>Committee</b>
Initiative R-1: Get more NC planners to become members of the Hazard Mitigation and Disaster Recovery division of APA	Action R-1.1 Work with existing division members to sponsor socials, meetups, and other networking events at the conference and elsewhere to get more planners acquainted with the division	1	New committee
	Action R-1.2 Work with existing division members to increase the number of conference session proposals covering hazard mitigation and disaster recovery	1	New committee
Initiative R-2: Involve planners in specific disaster recovery planning efforts, starting with communities still recovering from Hurricane Matthew	Action R-2.1 Perform at least one Matthew-focused NCPAT undertaking in 2018	1	NCPAT
	Action R-2.2 Assist a Matthew-impacted local government(s) in applying for a national CPAT in 2018	1	NCPAT
	Action R-2.3 Communicate with NC Emergency Management, FEMA, and other disaster recovery leaders (i.e., Gavin Smith) about the availability of APA-NC members to assist in recovery planning	1	New committee

<b>Initiative</b>	<b>Action</b>	<b>Year 1 – 4</b>	<b>Committee</b>
	Action R-2.4 Create a document that provides guidance and establishes an APA-NC protocol for responding to future disasters	3	New committee
	Action R-2.5: Identify potential partnerships with other agencies and organizations seeking to provide information and support for programs and policies encouraging the development of resilient communities	2	New committee
<b>Diversity &amp; Equity</b>			
<i>Goal: Promote diversity in the profession and equity in planning practice</i>			
Initiative DE-1: Equip NC planners with the awareness and skills necessary to work with diverse communities in developing plans	Action DE-1.1 Commit to providing diversity and equity-focused sessions at future NC Planning Conferences	1	Memb&Div
	Action DE-1.2 Sponsor learning and training opportunities around the state on how to effectively facilitate planning exercises in diverse communities, including lectures, courses, and webinars	2	Memb&Div

<b>Initiative</b>	<b>Action</b>	<b>Year 1 – 4</b>	<b>Committee</b>
	Action DE-1.3 Encourage attendance or at one of the workshops run by the Racial Equity Institute: <a href="https://www.racialequityinstitute.org">https://www.racialequityinstitute.org</a> to understand systemic equity issues		
Initiative DE-2: Increase outreach to secondary schools to introduce minority students to the profession of planning	Action DE-2.1 Create a standard set of materials and recruit volunteers to give guest appearances at high schools and other secondary schools around the state	2 - 3	Educ&Out
Initiative DE-3: Provide Networking Opportunities for Planners of Color	Action DE-3.1: Hold social gatherings, brown bag lunches, and conversation hours with planners of color for the purpose of networking	2	Memb&Div
	Action DE-3.2: Reposition the Diversity Mixer as a free social event that coincides with the NC Planning Conference and invite all APA-NC members. This social event should include a experience that focuses on ethical and cultural issues	2	Memb&Div