

**2006 PERFORMANCE REPORT OF THE REGIONAL AND  
INTERGOVERNMENTAL PLANNING DIVISION OF  
THE AMERICAN PLANNING ASSOCIATION**

**Note: The following report was developed per the March 13, 2007 Annual Report format, item per item as requested in that directive.**

**MEMBERSHIP SERVICE CRITERIA**

**Divisions Mission Statement: The Division's Mission Statement and Goals are:**

**“Basic Mission:** The Regional and Intergovernmental Planning Division exists to promote a sense of awareness and understanding of the interdependent nature of local, state, and federal levels of government in the planning and development of our nation's communities. This interdependence includes communities, both rural and urban, metropolitan and non-metropolitan. It also includes planning and development at the multi-jurisdictional level, across local governmental boundaries in both metropolitan and nonmetropolitan areas. The further mission of the Regional and Intergovernmental Planning Division is to provide a forum and mechanism for the exchange of information, knowledge, and solutions among professional planners, appointed planning officials, and other allied groups and individuals involved in urban and regional planning.”

**Goals to Support the Basic Mission:”**

- (1). Promote the development of a “regional and intergovernmental perspective” in planning through high quality national conference and other conference sessions, both by the Division and by other APA organizations.”
- (2). Provide useful and timely communication to Division Members on a regular basis through various means, including a newsletter, an up-to-date WEB-page and other electronic and non-electronic means.”
- (3). Evolve formal education and other training means relative to the “regional and intergovernmental planning perspective” in the urban and regional planning profession.
- (4). Support the comprehensive nature of urban and regional planning --- physical, environmental, economic, and social---through technical, policy, and research activities focusing on the “regional and intergovernmental planning perspective” in comprehensive planning.”

**Communications:**

**Newsletters:** Newsletters submitted since the last full performance report are: (a) August, 2005; Lead article on the New Jersey Meadowlands Commission new Comprehensive Economic Development/Environmental Protection Plan---distributed by e-mail; (b) January 2006, Lead article on the new San Diego Association of Governments Regional Plan---distribution by e-mail; (c) August 2006, The lead article on the 14 Sub regional Planning and Development Agencies that now make up the Southern California Association of Governments---distribution, hard copy by U.S. mail; and, (d) March of 2007, The lead article is on the Statewide system of Regional Councils in South Carolina.

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**Website:** We believe two features of our Web site mentioned here are unique. First, we have all of presentations, where they are available, concerning our panels at the APA national conference going back through 2003. And these presentation were on regional planning across the country. Over these four years, they have included presentations concerning metropolitan Atlanta, Austin, Baltimore, Boise, Dallas-Ft Worth, Houston, Kansas City, Salt Lake City-Ogden (Envision Utah), San Diego, San Francisco, Sacramento, and Washington, DC.

Second, our web site includes issues of the “Regional Community Development Action News” going back six to eight months, and through links on the web site, a member, if he/or she so desires, can retrieve copies going back to the founding of this weekly newsletter in the fall of 2003.

This particular list serve newsletter compiles annotations from articles in the print media around the world concerning regional events. It now has a distribution of about 600 members and is put together as a “labor of love” by Division member Thomas Christoffel. The typical newsletter weekly newsletter is between 12 and 15 pages. In this newsletter, Mr. Christoffel periodically gives our Division “a plug,” and in our growth, we know that some of our members have come from notices in this newsletter. The newsletter is put together through combined Google/Yahoo searches.

**List Serve:** Our newsletter editor, Scott Taylor, runs our list serve and it was used for periodic events such as the elections, newsletters, and special announcements. All Division members are on the list serve. Going back to the “Regional Community Development Action Newsletter,” it is also sort of a secondary list serve for the Division. That is, among it 600 subscribers, perhaps a majority of our Division members are included. And periodically, (e, g. once every month), Mr. Christoffel provides information to members in his “Regional Community Action Newsletter” concerning our Division, or promoting our Division.

**Member Survey:** We did not conduct a member survey.

### **Conference Session Sessions/Workshops**

**2006 Conference Sessions:** (1) “Urban Corridor Land-Use Transportation Planning,,” a review of work underway to fully incorporate land use and community considerations for the K-10 Corridor in the Kansas City region, the Southwest Parkway in Fort Worth, Texas, and the Trinity Parkway in Dallas, Texas. (2) “Big Regions, Grand Visions,” a review of the regional visioning processes going on in the greater Austin, Dallas-Fort Worth, and Houston-Galverston areas.

**2007 Conference Sessions:** (1) “Three New Jersey Agencies Plan Regionally,” a review of planning work and its effective implementation going on per the Pinelands Commission (covers 21-22 percent of the State’s land mass), the Meadowlands Commission, and the Highlands Council. (2) “From Army Post to New Town,” a discussion on the trials and tribulations, including inter-jurisdictional planning considerations, involved in moving toward the development of a new town government for the urban area created by the highly successful reuse of the closed Devens Army Base in the northwestern Boston suburbs.

**Criteria For, and How Sessions Are Selected:** We have two major criterion for selection. First, they should “show-case” high-quality regional or intergovernmental/inter-jurisdictional planning. Second, so as to draw to the APA National Conference, we solicit panel subjects which are within 250-1000 miles of the given National Conference site. For example, for the 2006 San Antonio Conference, five of the six panels for our two by- right sessions were about program and project activities going on in the State of Texas. Or let us look at the panel from New Jersey for the 2007 Philadelphia Conference. The three regional planning agencies are drawing a lot of attention in the Garden State. Working with Carolyn Torma, we were able to present this panel on Tuesday afternoon when Planning Commissioners (hopefully

from New Jersey in this case) get one day rates and will come to this session, including hopefully planning commissioners who otherwise would not come to the APA conference

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Given those criteria, in 2007, the Division Board members who live and work on the East Coast, not including the Chair, selected the panels. We do not ask for solicitation of panels as we get such requests on an unsolicited basis. In 2007 we had four such requests.

### **Meetings**

We are not exactly sure of what is meant by this item, particularly given its descriptors, and therefore, we interpret it to mean the annual program and business meeting, executive board teleconferences, division board joint e-mails, and individual telephone and e-mails between board members.

In general, the major communications involve the budget and finances, membership levels, discussions on carrying out the work program, upcoming newsletters, elections in late 2005-early 2006, and subject matter and processes behind the development of an APA Policy Guide as well as an APA Planning Advisory Report or other similar APA document on Regional and Intergovernmental Planning.

### **Outreach:**

**Efforts on Outreach With other APA Divisions:** Discussions or e-mails over the last 12-15 months have usually been with the Chairs or other members of other Divisions as follows: Housing and Community Development (development of a joint newsletter article and other matters), Planning and the Black Community (Hurricane Katrina recovery efforts and APA assistance teams), Private Practice (Hurricane Katrina recovery efforts and APA assistance teams), Planning and Women (analysis of Division manpower, including when and why members leave the Division), Transportation (APA efforts to assist the National Association of Development Organizations in seeking APA training for Rural Planning Organizations, and also, sought technical assistance on conducting electronic elections), and Urban Design and Historic Preservation (serve as possible source of funding for a PAS or other similar APA document on Regional and Intergovernmental Planning).

**Benefits Derived From Outreach to Divisions:** Over the last 12-15 months, probably the biggest benefit was direct technical assistance by the Transportation Planning Division in assisting us to run an election electronically and an election in which the results were compiled outside of our Division. Another benefit both over the last 12-15 months and before that were conversations with the Chair of Planning and Women's division which helped us fully understand the dynamics of how divisions, at least small divisions, actually grow or lose people. This assistance led directly to our approach in how we recruit and retain division members.

**Efforts on Outreach Outside of the APA :** (1) attendance at November, 2006 Alliance for Regional Stewardship (ARS) Conference national meeting in Fort Lauderdale, Florida; (2) work with the Executive Director of the National Association of Development Organizations (NADO) in support of NADO's efforts to secure training assistance from APA for comprehensive and transportation planning for NADO's various members as numerous of these organizations take on the Rural Planning Organization function as now being promoted by the U.S. DOT (see Appendix D---a one page information paper we put together as suggested by APA Washington staff which went to Paul Farmer and Carolyn Torma per their meetings with NADO in January of 2007); (3) attend January 2007 National Association of Regional Councils (NARC) Legislative Conference in February of 2007 as a complimentary guest in support of their initiative to develop graduate level courses in metropolitan and regional planning; and (4), a response to a formal request from the Executive Director of the Coastal Georgia Regional Development Center (referred by Chicago APA office) to provide advise on some of the better regional planning agencies across the country that deal effectively with rapid growth and environmental considerations (see Appendix E---a copy of the incoming formal request).

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**Benefits Derived From Outreach Outside of APA:** One of the primary benefits from outreach with such organizations such as the ARS, NADO, and NARC is that we are better able to define the substantive input that should be developed for APA regional and intergovernmental planning policies as suggested and promoted by our Division. We also believe that, eventually, working with the Coastal Georgia Regional Development Center will help us in much the same way inasmuch as we intend to contact several forward-looking regional planning agencies to see how they work in this regard.

Individual work with NADO, we believe, moved the process along by which top APA staff management and NADO have worked together to foster possible APA training for NADO in the rural transportation planning area. And working with NARC on the initiative to develop a graduate course in regional planning directly helps us to achieve implementation goal 3 (foster formal education) under our basic mission statement as found on page 1 of this report. Finally, and perhaps most importantly, we believe that the closer ties we have established with these organizations will help us to grow our membership as we know, just from casual conversations, that there are a noticeable numbers of APA planners in these organizations who are not a member of our Division.

## **OPERATIONAL CRITERIA**

### **Membership**

**Growth:** As of March 9, 2007, our membership stood at 176. Per page 1 of the APA Staff Report, Division Council, as found in the APA Briefing Book for the Fall 2006 leadership meeting in Fort Worth, our Division grew by 17 percent in FY 2006 ending the fiscal year with a membership of 172. Thus, we were the fastest growing division in FY 2006. The same report showed that in the four-year period, FY 2003 to FY 2006 we grew from 130 to 172 members, a 37 percent gain.

**Why We Grew:** Probably the biggest reason for our growth was that, at our request, the APA Board changed our Division's name from "Intergovernmental Affairs" to "Regional and Intergovernmental Planning." Other factors were also at work. For example, the weekly compilation, "Regional Community Action News," with a distribution of 600 often "gives a plug" for our Division. And also, as the APA manpower numbers have become regular and reliable, and as APA manpower service personnel have become more service-oriented, it has provided us with the flexibility to work harder on retaining individual members.

**Decline in Membership:** Not applicable.

**Efforts to Engage New Members:** We do make telephone calls on occasion to some new members, but engagement is much better explained by the anecdotal examples of our members who have joined over the last three years. For example, Robert Leiter is now our Vice Chair for Metropolitan and Regional Planning, Debbie Lawlor is our Vice Chair for State Planning, Frank Osgood was the co-author of "The Role of Subregions in Los Angeles Regional Planning," the lead article in our August, 2006 newsletter, and Ben Whitaker wrote, "The South Carolina COG Network: Regional Collaboration on Statewide Plans," the lead article in our March, 2007 newsletter.

**Membership Committee:** We do not have such a committee.

### **Elections:**

**Year and Month of Elections:** 2006: February/March

**Current Officers:** Lee Schoenecker, Chair; Rocky Piro, Chair-Elect; Robert Leiter, Vice-Chair for Metropolitan and Regional Planning; Debbie Lawlor; Vice-Chair for State Planning; Patricia Atkins, Vice-

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Chair for National Planning; and Robert Kull, Secretary-Treasurer. All officer assumed their current effective role at the time of 2006 National Conference in San Antonio in 2006 and new officers will assume their roles at the time of the National Conference in Las Vegas in 2008.

**Efforts to Identify New Leaders:** Done through the normal recruiting and outreach processes. One very effective tool is to ask new members to write newsletter articles. They do that and then often become further interested in the division.

### **Financial Report:**

Our financial report through its tables as well as a one-page narrative summary are found elsewhere in this report. It was prepared by our Secretary-Treasurer---Robert Kull. It shows a beginning balance going into the new program year of \$5,370. Over the next 13-14 month program year, that year which is prescribed by the performance report guidelines, we anticipate \$3,145 dollars in revenues and \$5,200 in expenditures. Looking at the new Division Council criterion that dues-generated balances shall not exceed the total of the last two year's rebates, going back to March of 2005 which is two years back from the date of this report, our total rebates were \$5,098.55 and our total expenditures were \$3,214.55.

### **Division Representation:**

**Annual Business Meeting and Fall Business Meeting:** Lee Schoenecker, the Chair, represented the Division at the San Antonio 2006 National Conference in San Antonio and also the Fall Leadership Conference in Fort Worth in November of 2006. He will also be representing the Division at the 2007 National Conference in Philadelphia.

**Division Representation at Other APA Leadership Events:** Lee Schoenecker as well as Robert Kull, the Division's Secretary-Treasurer, represented the Division at the APA National Legislative Conference in March of 2006.

**Division Representation at Other Allied Organization Meetings/Conferences:** Robert Kull represented the Division at the July, 2006 meeting of the annual "Natural Hazardous Workshop" in Boulder, Colorado. Lee Schoenecker represented the Division at the National Association of Regional Councils National Legislative Conference in Washington, DC, in February, 2007 as well as the National Association of Development Organizations Legislative Reception in Washington, DC, also in February of 2007.

### **Governance**

The Executive Committee (the Board) consisting of six members is involved. For example, in the development of this report, they received an e-mail attached draft on February 21. On March 2, 2007 this draft was the main subject of a teleconference involving all six members of the Board, and then, further draft written comments were submitted to the Chair by March 7. As another example, in the development of the proposal to produce an APA PAS Report or other similar APA document, the Board was fully involved in the development of the documents including written and oral comments on the written draft. Such consultations are done through a combination of e-mail exchanges, person to person telephone calls, and teleconferences.

### **National APA Coordination Criteria**

**Policy Issue 1: APA Policy Guide on Regional and Intergovernmental Planning.** At the 2005 National APA Conference in San Francisco, the APA Board agreed to change our division name and at the same meeting they directed our Division to evolve an APA policy guide on regional and intergovernmental planning. At the 2006 National APA Conference in San Antonio, the Delegate Assembly, we made a presentation. Subsequent to our presentation, nine APA chapter got up and publicly stated that we should

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go forward with a policy guide. March and May issue papers, precursors to an APA Policy Guide are attached as appendices A and B of this report. Then, however, in the summer of 2006, in an APA Legislative and Policy Committee teleconference, the Chair of that Committee directed that the subject really required the development of an APA PAS Report. We are now pursuing a dual course: “shopping” a proposal for a PAS Report or other similar APA document,” and at the same time, we are still aiming for an APA Policy Guide on the same subject, hopefully with adoption at the 2008 Las Vegas National Conference.

**Policy Issue 2: 2006-2008 Proposed APA Development Plan and Budget:** In response to APA national comments on the APA Development Plan, we provided a proposed rewrite of the 2004-2006 APA Development Plan of 750 words to reflect regional and intergovernmental planning concerns as it would be incorporated into the 2006-2008 Development Plan and Budget. We simply consolidated a couple of prior redundant sections and then added about 50 words on regional and intergovernmental planning. The resultant document was still only about 750 words.

**Other Contributions: An APA PAS Report or Similar Document:** Per the conversation above on the development of APA policy on regional and intergovernmental planning, we have also developed a proposal for a policy PAS Report or other similar document. Attached as Appendix C is a 14-page proposal that was recently sent out to a possible funding source. We intend to “shop” this proposal with out without modifications, both to funding sources and also as a matter of evolving APA policy on regional and intergovernmental planning policy.

## **Volunteers**

**Efforts to Identify and Engage Volunteers:** Perhaps most importantly we now have people, who originally volunteered on our six-person board. Also, we periodically raise questions with new members as to whether they would like to get involved, particularly in the development of the newsletter. In fact, our next newsletter contains nothing but articles by people who volunteered. (We must admit, we do have a hard time distinguishing between, “volunteers” and regular member’s of the Division. Perhaps what was meant by the term, “volunteers” is that the phrase used should be “new members.” And our answer for “new members” is the same as that for “volunteers.”)

## **Summary**

The “highlights” and thrust of our Division’s work over the last year or so is summarized on the one- page cover letter to this report. However, we will briefly give a summary report below as asked for in the annual report format:

### **State of the Division**

**Membership and Trend:** There is no doubt about the fact that we are in much better shape than when we last report in late January of 2005. At that time we had 130 members. Today, we have 176 members, an increase of 46 members or a growth of 35 percent in a two-year period. Also, as has been mentioned before, a fall of 2006 APA report showed that in fiscal year 2006 our Division had grown by 17 percent and that we were the fastest growing of the APA Divisions in that fiscal year.

We hope to continue this trend, but it will take work. That will include personal contacts to ensure that members, who personally drop out per APA records are encouraged to rejoin (we have done that with success in the immediate past. It will also mean reaching out for new membership to organizations such as the National Association of Regional Councils, the National Association of Development Organizations, and the Association of Metropolitan Planning Organizations. Above all else, it will mean aggressively pushing on APA policy regional and intergovernmental planning.

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**Benefits:** The primary benefit for members is that they now have an organization within the APA which provides a home for their interests and aggressively promotes regional and intergovernmental planning. Further, they also benefit from an organization that reaches out to other organizations with interests in regional planning. And also they also benefit from receiving newsletters and having a web site to meet their interests.

### **Successes**

**Status of Division:** Perhaps our biggest success this year was growing our Division. In our 2005 performance report we indicated that our biggest weakness was that we needed a larger Division to financially sustain ourselves over time. And the Division Council's review of the then performance report agreed with us. That was our number one priority for the future. And we feel that over the last two years we have met the challenge, but we still have work ahead to reach a membership of at least 200.

**Program and Project Successes:** We would have to say that getting the attention of the APA internally concerning the importance of regional planning and intergovernmental planning is our biggest success. We are still not where we want to be in terms of full recognition by the APA of the importance of this subject, but we believe we have come a long way since the last performance report some 25 months ago.

A second success, and it has really only come about in the last six months or so, is the recognition by such major interest groups, that deal with sub-state regionalism, such as the National Association of Development Organizations (NADO) and the National Association of Regional Councils (NARC). We definitely were an important element in the National APA staff meeting with top NADO staff and their main working groups, and there is a good chance the APA will be providing NADO organizations with comprehensive and transportation planning organizations in the future. Also, NARC has definitely asked us to participate with them and we are actively doing so in their educational efforts to develop a graduate-level course in regional planning.

### **Challenges**

**Concerns for the Division Field of Planning:** They are pretty much the opposite of the positive effects above. That is, on the one hand, we have made strides in bringing attention to the importance of the field of regional and intergovernmental planning within the APA. Yet, on the other hand, we still have a long ways to go in terms of recognition with the APA concerning the importance of regional and intergovernmental planning.

External to the APA, there are some specific concerns. However, at this time organizations such as NADO and NARC are in a better position to handle these concerns. We can help NADO, NARC, and others such as described above. However, until there is strong recognition of the importance of regional and intergovernmental planning within the APA, we are not in a position to mount any type of strong outreach effort.

**Administrative and Organizational Issues** We do have an administrative problem to fill the role of our newsletter and list-serve editor who recently resigned. And of course, we still want to raise our membership numbers.

**Addressing the Issues and Concerns:** In various places we have addressed how we will deal with matters of still increasing our membership and how we will gain further recognition for the field of regional and intergovernmental planning within the APA. With regard to issue of the newsletter, the entire Board is engaged in trying to find a replacement for our newsletter, list-serve editor.

