



American Planning Association Iowa Chapter Board Meeting

Virtual Meeting Only (Zoom)
July 16, 2021
10:00 AM

American Planning Association
Iowa Chapter

Creating Great Communities for All

Join Zoom Meeting

Join Zoom Meeting

<https://us02web.zoom.us/j/87648293934?pwd=enZmOWNsb3l3UUZXeHRxcDVJK3NJQT09>

One tap mobile

+13126266799,,87648293934#,,,,*972343# US (Chicago)

Dial by your location

+1 312 626 6799 US (Chicago)

Meeting ID: 876 4829 3934

Passcode: 972343

Find your local number: <https://us02web.zoom.us/j/kcm8oXyHPS>

Meeting Agenda

1.0 Call to Order

2.0 Roll Call

Officers:

President-	Dylan Mullenix
Vice President-	Madeline Sturms
Past President-	Ben Champ
Secretary-	Bill Micheel
Treasurer-	Zach Young

Executive Board Members:

Professional Development Officer-	David Wilwerding
Planning Board Member-	Trina Flack
University of Iowa-	Lucy Laurian
Iowa State University-	Francis Owusu
At-Large-	Charlie Nichols
At-Large-	Alexsis Fleener
At-Large-	Jim Holz

Program Area Chairpersons

• Chapter Development-	Chris Janson
	Anne Russett
• Professional Development-	Charlie Cowell
• Outreach/Advocacy-	Melissa Tiedemann
	Rose Schroder
• Legislative & Policy-	Steven Van Steenhuyse
	Emily Bothell
• Recognition/Awards Co Chairs-	Chris Shires
• Public Relations/Communications-	Liesl Seabert

Liaisons (non-voting)

• University of Iowa Graduate-	<i>Vacant</i>
• Iowa State University Undergrad-	Ashelyn Daniels
• Iowa State University Graduate-	Andre LaFontant
• County Planning/Zoning Officials-	Bret VandeLune
• Floodplain/Stormwater Management-	Mark Land

3.0 Introduction and Welcoming of any Guests/Others

4.0 Approval of Agenda and Minutes

- 4.1 Approval of Agenda for Friday, July 16, 2021
- 4.2 Approval of Minutes of Friday, May 21, 2021 – *Attachment*

5.0 APA Iowa Membership Forum/Input

6.0 Presentations

- 6.1 State of Iowa Legislative Update – Tom Cope
- 6.2 APA Climate Champions Program – Allison Van Pelt

7.0 Business Items

- 7.1 Consideration of submitting 2021 CPC (Chapter President's Council) Grant application to fund the DEI Board Training – Dylan Mullenix
- 7.2 DEI Committee Recommendation to begin APA-IA Chapter by-law amendment process – Michael Delp

8.0 Discussion Items

- 8.1 Recommendation from APA-IA Nominating Committee for election slate of candidates for APA-IA – Ben Champ/Melissa Tiedemann
- 8.2 2021 APA-IA conference in Des Moines – Madeline Sturms
- 8.3 Chapter Demographic Information Presentation – Dylan Mullenix
- 8.4 APA-IA Board Meeting Attendance (Virtual/in-person) – Dylan Mullenix

9.0 Officers Reports

- 9.1 President (Mullenix)
- 9.2 Vice President (Sturms)
- 9.3 Immediate Past-President (Champ)
- 9.4 Secretary (Micheel)
- 9.5 Treasurer (Young)
- 8.5.1 Chapter Treasurers Report- *Attachment* - Receive and Accept Report

10.0 Executive Board Reports

- 10.1 Professional Development Officer (Wilwerding)
 - 10.1.1 Discuss CPC AICP Exam Study Manual
- 10.2 Planning Board Member (Flack)
- 10.3 University of Iowa (Laurian)
- 10.4 Iowa State University (Owusu)
- 10.5 At Large Representatives (Holz/Nichols/Fleener)
- 10.6 Chapter Development Program (Janson/Russett)
- 10.7 Professional Development (Cowell)
- 10.8 Outreach/Advocacy Program (Schroder/Tiedemann)
- 10.9 Legislative and Policy Program (Van Steenhuyse)
- 10.10 Recognition/Awards Program (Bothell/Shires)
- 10.11 Public Relations/Communication Program (Seabert)
- 10.12 University of Iowa Graduate Program (*Vacant*)
- 10.13 Iowa State University Undergraduate Program (Daniels)
- 10.14 Iowa State University Graduate Program (LaFontant)
- 10.15 County Planning and Zoning Officials of Iowa (VandeLune)
- 10.16 Iowa Floodplain and Stormwater Management Association (Land)

11.0 Other Items Not on the Agenda

12.0 Upcoming Board meeting

September 17, 2021: Location - TBD

13.0 Adjournment of Board Meeting

DRAFT Minutes
APA-IA Chapter Board Meeting
Friday, May 21, 2021

1.0 Call to Order

President Dylan Mullenix called the meeting of the American Planning Association Iowa Chapter to order at 10:00 am during a virtual meeting using Zoom as a result of social distancing recommendations due to coronavirus.

2.0 Roll Call

Executive Board

Officers

+	Dylan Mullenix	President
+	Madeline Sturms	Vice President
+	Ben Champ	Past President
NP	Bill Micheel	Secretary
+	Zach Young	Treasurer

Professional Development Officer

+	David Wilwerding	
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Planning Board Member

NP	Trina Flack	
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University Representatives

+	Lucie Laurian	University of Iowa
+	Francis Owusu	Iowa State University

Program Area Chairs

+	Chris Janson	Chapter Development
+	Anne Russett	Chapter Development
+	Chris Shires	Professional Development
+	Melissa Tiedemann	Outreach / Advocacy
+	Rose Schroder	Outreach / Advocacy
+	Steven Van Steenhuyse	Legislative & Policy
+	Charlie Cowell	Recognition / Awards
NP	Emily Bothell	Recognition / Awards
NP	Liesl Seabert	Public Relations / Communications

At-Large Members

NP	Charlie Nichols	
+	Alexis Fleener	
+	Jim Holz	

Liaisons (non-voting)

NP	Leon Begay	University of Iowa Graduate
NP	Ashlyn Daniels	Iowa State University Undergraduate
NP	Andre LaFontant	Iowa State University Graduate
+	Bret VandeLune	County Planning / Flood Officials
NP	Mark Land	Floodplain / Stormwater Management

17 (of 21) - Voting Members Present (notated "+") (12 required to achieve quorum)

3.0 Introduction and Welcoming of Any Guests/Others

Dylan Mullenix asked if there were any guests and recognized Lucie Laurian, Professor and Director of the University of Iowa School of Planning and Public Affairs. Mullenix also recognized Joe Wilensky, Transportation Planner with Snyder & Associates out of Cedar Rapids who both introduced themselves.

4.0 Approval of Agenda and Minutes

4.1 Approval of Agenda for Friday, March 19, 2021.

Mullenix mentioned that Allison Van Pelt was unable to attend the meeting and that agenda item will be removed from this meeting's agenda and appear on the July meeting agenda. Mullenix asked for any additional amendments to the agenda and a motion for approval of the agenda as amended.

Motion by Holz, seconded by Sturms. Unanimous Approval.

4.2 Approval of the Minutes, as read, from Friday, January 15, 2021.

Motion by Holz, seconded by Bothell. Unanimous Approval.

5.0 APA Iowa Membership Forum/Input

Mullenix opened the floor for membership input. No discussion.

6.0 Business Items

6.1 Diversity, Equity, Inclusion Committee Training Recommendation

Mullenix indicating that the training the DEI Committee have recommended is included in packet. Mullenix asked Russett if there was anything that she would like to add. Russett indicated she would answer questions if Board members had any. Holz asked if there was a cost associated with the training. Mullenix stated that the original cost was for 20 people \$4,200 and that the new quote for additional participants (up to 30 participants) would be \$5000. Holz asked if the 2-day training was two full days or half days. Russett indicated that the training sessions are 2 ½ hours per day. Training would be virtual.

Sturms indicated that she thinks the training is a great thing to do and is included in the budget and likes keeping it virtual unless there are concerns about the need for in-person interactions. Mullenix asked for further discussion.

Russett motioned approval, Laurian indicated that the best sessions are the ones that take the most time because the longer they are the more in depth the training is and therefore it is more useful. Russett indicated that she can see the value in Laurian's comments and wants the trainings to be on going have regular ongoing trainings. This would just be the first step. Motion seconded by Bothell.

Motion by Russett, seconded by Bothell. Unanimous Approval

Wilensky asked if combining the DEI training and the conference keynote speaker was being considered. Mullenix indicated that the idea is to have some kind of DEI education at the conference, but the form of that education has not been ironed out yet. The issue can be discussed more during the conference agenda item. Mullenix also indicated that offering the training to the rest of the membership, after the Board has participated in the training, possibly at or before the conference, has also been discussed.

6.2 Consider appointment of Lucie Laurian as Board representative for the University of Iowa

Mullenix indicated that Laurian is the new Director of the University of Iowa School of Planning and Urban Affairs. Van Steenhuyse asked Laurian if she was appointed permanently or on an interim bases. Laurian replied that she was appointed for a period of 3 years and then a decision on her reappointment will be made.

Motion by Van Steenhuyse, seconded by Shires. Unanimous Approval.

6.3 Consider FAICP nomination from APA-IA for John Peterson

Mullenix indicated that John Peterson was being presented as an option for nomination by the APA-IA Board. Mullenix asked for a nomination. Shires indicated that the application is a lot of work and so support and commitments to provide letters of support from members of the Board are important. Shires stated that Peterson has been AICP certified since 1984.

Motion Wilwerding, seconded by Janson. Unanimous Approval.

7.0 Discussion Items

~~7.1 APA Climate Champions—Allison Van Pelt~~

7.2 Election Slate of Candidates for APA-IA

Mullenix stated that the slate of candidates for the APA-IA Board is due by the 16th of May and by July 1st the Board has to provide the slate of candidates to APA national. The APA-IA by-laws also state that a nominated committee has to be formed within 60 days to sign off on the nominations. Mullenix asked members of APA-IA if they would serve (Champ, Wilensky, Tiedemann)

Mullenix indicated that Sturms submitted for President, Siebert for Vice-President, Micheel for Secretary, and Young for Treasurer.

7.3 2021 APA-IA Conference in Des Moines

Sturms indicated that the first conference planning session occurred yesterday. Sturms indicated that the event will be held at the Iowa Events Center October 13th – 15th this fall and will only be offered in-person due to financial constraints. Masking guidelines will provided later and State law will considered in this decision. Strums also provided an update on possible sessions and mobile walking tours. Mullenix indicated that we look into insurance in case we need to cancel again this year. Kristina indicated that she would follow-up with the insurance company about that type of coverage. Sturms indicated that someone from the DEI Committee will be nominated to serve on the Conference Planning Committee and that she had reached out to Ottumwa about the 2022 conference and they agreed to shift the 2021 contract to 2022. Russett mentioned that the DEI Committee was interested in reaching out to April Jackson from Florida State University as a potential keynote speaker.

Officers Reports

8.1 President (Mullenix)

Mullenix discussed his participation in the bi-annual Chapter President's Council. Mullenix indicated that Wilwerding will be discussing updates to the AICP program during his update.

8.2 Vice President (Sturms)

No report.

8.3 Immediate Past-President (Champ)

No report.

8.4 Secretary (Micheel)

Absent

8.5 Treasurer (Young)

8.5.1 Chapter Treasurers Report – *Attachment-*

Young indicated that the Treasurer's Report was included in the agenda packet and provided highlights from the Report. Young did indicate that the Chapter is coming up short on annual sponsorships. Finally, Young mentioned that he will work with Sturms on drafting the Conference budget soon.

Motion to receive and accept the Treasurer's Report by Wilwerding, seconded by Sturms. Unanimous Approval.

9.0 **Executive Board Reports**

9.1 Professional Development (Wilwerding)

Wilwerding discussed the updated AICP exam prep manual. Wilwerding also indicated that the Chapter historically has purchased a number of study guides to provide to members and asked if we want to continue to do that. The guides will cost the Chapter \$10/download and individuals can purchase them for \$15 each.

Schroder indicated that she thinks that we should continue to offer the resource, but wondered how the Chapter would provide the AICP student with an access code that likely will be a "one-time" use license. Wilwerding mentioned that he anticipates going through 15 to 20 licenses per year.

Russet indicated that she agrees with Schroder that the Chapter should continue to purchase and offer those guides to AICP students.

Mullenix acknowledged Board consensus to purchase some study guides.

Wilwerding discussed the changes to the AICP CM credits (AICP members will now be on the same cycle resulting from COVID). All member's cycle will be closing at the end of this calendar year.

Wilwerding then discussed the changes to the AICP approval process (we are entering the 5th year of the 5-year pilot program). Some changes will be made as a result including modifying the process so that candidates can submit an "initial" application, if the application were approved then you can sit for the test, after passing the test the candidate would be considered an AICP candidate. Then once you have the necessary amount of experience then you can submit that to obtain the full certification. Wilwerding also discussed that elimination of the essay question responses was being discussed.

9.2 Planning Board Member (Flack)

Not present.

9.3 University of Iowa (Laurian)

Laurian explained that she just became the Director and participated in an in-person graduation ceremony. Laurian mentioned that two new faculty were hired in response to the creation of the Masters of Public Affairs degree. Laurian continued that the School is also working on creating undergraduate minors in the field. Laurian asked for help from APA-IA/National for planning awareness. Laurian also outlined the School's social media efforts

9.4 Iowa State University (Owusu)

Owusu provided an update on post-COVID adaptation and lessons learned including the possibility of moving some courses exclusively online including GIS certificates and others. Owusu reported that their joint degree program with the Masters of Real Estate Development degree graduated their first cohort of 10 students.

9.5 At-Large Representative (Holz/Nichols/Fleener)

Holz - No report. Nichols – Absent. Fleener indicated that she will be working on the Mentor Match program for the conference and if you are interested to contact her.

9.6 Chapter Development Program (Janson/Russett)

No reports.

9.7 Professional Development (Cowell)

Cowell indicated that he is continuing to be involved in the DEI Committee and the first session of the Planning on Tap series will be Thursday, May 27th, targeting 1 session per month, skipping October and December.

9.8 Outreach / Advocacy Program (Schroder/Tiedemann)

Schroder reported that she has been working on strategic objectives in the work plan that relate to Outreach and Advocacy and may need to be amended. Specifically, planning awareness for youth. Schroder indicated that she will reach out to people offline. Tiedemann has been communicating with other similar professional organizations about conferences and chapter goals.

9.9 Legislative and Policy Program (Van Steenhuyse)

Van Steenhuyse provided an update on the legislative session. Van Steenhuyse indicated that the partnership with Cope/Murphy (lobbyist) went very well and they were very responsive and valuable. Van Steenhuyse outlined a bill that passed that limits the ability of municipalities to regulate propane and natural gas tanks and mentioned that changes to TIF legislation were fought back and we did not get a land bank bill this year. Van Steenhuyse also mentioned that the backfill for local governments will be phased out over 5 to 8 years. Van Steenhuyse mentioned that Eric Christiansan with ISU Extension moved to Florida and is curious who the new person working with our region will be.

Wilensky asked if APA-IA's if our lobbying efforts were done in tandem with other professional organization. Van Steenhuyse mentioned that the lobbyists are making those connections.

9.10 Recognition / Awards Program (Bothell/Shires)

Bothell reported that her and Shires have been working on ways to highlight plans or projects that have received recognition and ways to assist with APA National award applications and will be working on the FAICP application for John Peterson.

9.11 Public Relations / Communication Program (Seibert)

No reports.

9.12 University of Iowa Graduate Program (Position vacant)

No report.

9.13 Iowa State University Undergraduate Program (Daniels)

Not present

9.14 Iowa State University Graduate Program (LaFontant)

Not present

9.15 County Planning and Zoning Officials of Iowa (Van de Lune)

No report.

9.16 Iowa Floodplain and Stormwater Management Association (Land)

Not present

10.0 Other Items Not on the Agenda

11.0 Upcoming Board Meetings

The May meeting is scheduled for Friday the 21st at 10 a.m. Location - Zoom

12.0 Adjournment of the Board Meeting

Mullenix adjourned the meeting.

Dylan Mullenix, AICP
President

Date: _____

Madeline Sturms, AICP
Vice President

Date: _____

APA Iowa
Balance Sheet Standard
As of June 30, 2021

	<u>Jun 30, '21</u>
ASSETS	
Current Assets	
Checking/Savings	
Bank Iowa	<u>49,861.21</u>
Total Checking/Savings	<u>49,861.21</u>
Total Current Assets	<u>49,861.21</u>
TOTAL ASSETS	<u><u>49,861.21</u></u>
LIABILITIES & EQUITY	
Equity	
Opening Balance Equity	39,871.61
Retained Earnings	11,700.38
Net Income	<u>-1,710.78</u>
Total Equity	<u>49,861.21</u>
TOTAL LIABILITIES & EQ...	<u><u>49,861.21</u></u>

APA Iowa
Reconciliation Detail
Bank Iowa, Period Ending 06/30/21

Type	Date	Num	Name	Clr	Amount	Balance
Beginning Balance						54,310.34
Cleared Transactions						
Checks and Payments – 3 items						
Check	06/13/21	1032	Cope Murphy + Co LLP	X	-3,750.00	-3,750.00
Check	06/01/21	1031	Sickels & Associates, Inc.	X	-600.00	-4,350.00
Check	06/01/21	ACH	APA – National	X	-100.00	-4,450.00
Total Checks and Payments					-4,450.00	-4,450.00
Deposits and Credits – 1 item						
Deposit	06/30/21			X	0.87	0.87
Total Deposits and Credits					0.87	0.87
Total Cleared Transactions					-4,449.13	-4,449.13
Cleared Balance					-4,449.13	49,861.21
Register Balance as of 06/30/21					-4,449.13	49,861.21
Ending Balance					-4,449.13	49,861.21

1225 Jordan Creek Parkway, Suite 200
West Des Moines, IA 50266

Main: (515) 967-7283
Fax: (515) 967-7270

Page: 1 of 3
Account: 8000088480

AMERICAN PLANNING ASSOCIATION
IOWA CHAPTER
2500 W 2ND AVE
STE 16
INDIANOLA, IA 50125

PERIODIC STATEMENT
Date: Jun 30, 2021
Period: Jun 01, 2021 to Jun 30, 2021
(30 days)
Enclosures: 2

Your Account(s) at a Glance

Deposit Account(s)	Account #	Interest Earned YTD	Balance as of 06/30
Business Interest Ch	CK-8000088480	5.44	49,861.21

ACCOUNT #: CK - 8000088480 Business Interest Checking

AMERICAN PLANNING ASSOCIATION
IOWA CHAPTER

Account Summary

Beginning Balance as of 06/01/21	54,310.34
Deposits & Other Credits	0.87
Charges & Fees	0.00
Checks & Other Debits	4,450.00
Average Balance	52,630.34
Ending Balance as of 06/30/21	49,861.21

Deposits and Withdrawals Transaction Information

Date	Check#	Description	Amount	Balance
06/01		ATM POS Debit AMERICAN PLANNING A 3124319100 ILUS #0964 #MDB8UD3190527	100.00-	54,210.34
06/02	1031	Check	600.00-	53,610.34
06/23	1032	Check	3,750.00-	49,860.34
06/30		Interest Credit	0.87	49,861.21

Checks Cleared

Date	Check#	Amount	Date	Check#	Amount
06/02	1031	600.00	06/23	1032	3,750.00

Main: (515) 967-7283
Fax: (515) 967-7270

Page: 2 of 3
Account: 8000088480

Daily Balance Information

Date	Balance	Date	Balance	Date	Balance
06/01	54,210.34	06/23	49,860.34		
06/02	53,610.34	06/30	49,861.21		


Charges and Fees Related to Overdrafts and Returned Items

		Total For This Period	Total Year-to-Date
Total Overdraft Fees:	0.00	0.00	
Total Returned Items Fees:	0.00	0.00	


If you have been paying multiple overdraft fees, there may be an alternative product that better suits your needs. Please contact us to discuss your options or any questions you have about your account.



BANK IOWA®

AMERICAN PLANNING ASSOCIATION IOWA CHAPTER 2500 W 2ND AVE. STE 10 INDIANOLA, IA 50125		1031 72-2041/739
Date <u>6-1-21</u>		<input checked="" type="checkbox"/> CHECK <input type="checkbox"/> AMOUNT
Pay to the Order of <u>Sidley & Associates Inc.</u>	\$ <u>600.00</u>	
<u>Six hundred and 00/100</u>	Dollars	<input checked="" type="checkbox"/> <input type="checkbox"/>
 www.bankiowa.bank		
For <u>Kristina Sidley</u>		
⑆073920418⑆ 8000088480⑆ 1031		

06/02/2021 1031 \$600.00

AMERICAN PLANNING ASSOCIATION IOWA CHAPTER 2500 W 2ND AVE. STE 10 INDIANOLA, IA 50125		1032 72-2041/739
Date <u>6-13-21</u>		<input checked="" type="checkbox"/> CHECK <input type="checkbox"/> AMOUNT
Pay to the Order of <u>Cope Murphy</u>	\$ <u>3,750.00</u>	
<u>Three thousand seven hundred fifty and 00/100</u>	Dollars	<input checked="" type="checkbox"/> <input type="checkbox"/>
 www.bankiowa.bank		
For <u>Kristina Sidley</u>		
⑆073920418⑆ 8000088480⑆ 1032		

06/23/2021 1032 \$3,750.00

In Case of Errors or Questions about your Electronic Transfer (applies to accounts established primarily for personal, family, or household purposes)

Write us at the address on the front of this statement as soon as you can if you think your statement or receipt is wrong, or if you need more information about a transfer on the statement or receipt. We must hear from you no later than 60 days after we sent you the FIRST statement on which the error or problem appeared.

1. Tell us your name and account number (if any).
2. Describe the error or transfer you are unsure about and explain as clearly as you can why you believe it is an error or why you need more information.
3. Tell us the dollar amount of the suspected error.

We will investigate your complaint and will correct any error promptly. If we take more than 10 business days to do this, we will credit your account for the amount you think is in error, so that you have use of the money during the time it takes us to complete our investigation.

**Computation of Interest Charges for Overdraft Lines of Credit
Daily Balance Method (Including Current Transactions)**

We figure the finance charge on your account by applying the periodic rate to the daily balance of your account for each day in the billing cycle. To get the daily balance we take the beginning balance of your account each day, add any new advances, and subtract any unpaid finance charges and any payments or credits. This gives us the daily balance.

What To Do If You Think You Find A Mistake On Your Statement

If you think there is an error on your statement, write to us at the address shown on your bill as soon as possible. In your letter, give us the following information:

- Account information: Your name and account number.
- Dollar amount: The dollar amount of the suspected error.
- Description of Problem: If you think there is an error on your bill, describe what you believe is wrong and why you believe it is a mistake.

You must contact us within 60 days after the error appeared on your statement. You must notify us of any potential errors in writing (or electronically). You may call us, but if you do, we are not required to investigate any potential errors and you may have to pay the amount in question.

While we investigate whether or not there has been an error, the following are true:

- We cannot try to collect the amount in question, or report you as delinquent on that amount.
- The charge in question may remain on your statement, and we may continue to charge you interest on that amount. However, if we determine that we made a mistake, you will not have to pay the amount in question or any interest or other fees related to that amount.
- While you do not have to pay the amount in question, you are responsible for the remainder of your balance.
- We can apply any unpaid amount against your credit limit.

Please send deposits to your local Bank Iowa or please use an address below.

Clarinda Region
101 E Main St.
PO Box 119
Clarinda, IA 51632

Denison Region
1108 Broadway
PO Box 40
Denison, IA 51442

Des Moines Region
1150 Jordan Creek Pkwy.
West Des Moines, IA 50266

Humboldt Region
506 Summer Ave.
PO Box 37
Humboldt, IA 50548

Lawler Region
500 E. Hwy. 24
PO Box 269
Lawler, IA 52154

Oskaloosa Region
1710 Third Ave. E.
PO Box 1130
Oskaloosa, IA 52577

Shenandoah Region
701 W. Sheridan Ave.
Shenandoah, IA 51601

**BALANCE YOUR
ACCOUNT**

BY DOING THESE THINGS

Fill in Below Amounts from Your STATEMENT and CHECKBOOK

Balance Shown on
YOUR STATEMENT\$ _____

Add Deposits
Not on Statement\$ _____

Sub Total\$ _____

CHECK No.	Subtract Checks Issued But Not on Statement \$
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Total.....\$ _____

BALANCE.....\$ _____

Balance Shown in
Your Check Book.....\$ _____

Add any Deposits not
Already Entered in
Check Book.....\$ _____

Sub Total\$ _____
Add Interest Paid.....\$ _____

Subtract Service Charges
and other Bank Charges
Not in Check Book
\$ _____

Total.....\$ _____

BALANCE.....\$ _____

APA Iowa
Profit and Loss Budget vs. Actual
January through June 2021

	Jun '21	YTD	Budget	\$ Budget	% Budget
Income					
All Iowa Reception/Uni Share	0.00	0.00	1,200.00	-1,200.00	0.0%
Annual Sponsorships					
Gold (\$1,500)	0.00	1,500.00	3,000.00	-1,500.00	50.0%
Platinum (\$2,500)	0.00	0.00	5,000.00	-5,000.00	0.0%
Silver (\$1,000)	0.00	2,000.00	6,000.00	-4,000.00	33.3%
Total Annual Sponsorships	0.00	3,500.00	14,000.00	-10,500.00	25.0%
APA Dues Rebate	0.00	8,307.17	13,500.00	-5,192.83	61.5%
Conference Income	0.00	0.00	45,500.00	-45,500.00	0.0%
Grant Income					
Call to Action Income	0.00	0.00	1,200.00	-1,200.00	0.0%
Planner4Health Income	0.00	0.00	1,975.00	-1,975.00	0.0%
Total Grant Income	0.00	0.00	3,175.00	-3,175.00	0.0%
Interest Income	0.87	5.44			
Partnership Income	0.00	0.00			
Transfer from Reserves	0.00	0.00	5,000.00	-5,000.00	0.0%
Total Income	0.87	11,812.61	82,375.00	-70,562.39	14.3%
Expense					
Bank Charges	0.00	0.00	100.00	-100.00	0.0%
CM Dues/Subscriptions	0.00	1,254.00	1,254.00	0.00	100.0%
Conference Expense	0.00	0.00	44,000.00	-44,000.00	0.0%
Grants Expense					
Call to Action Expense	0.00	0.00	1,200.00	-1,200.00	0.0%
Planner4Health Expense	0.00	0.00	1,975.00	-1,975.00	0.0%
Total Grants Expense	0.00	0.00	3,175.00	-3,175.00	0.0%
Lunch and Learns	0.00	0.00	250.00	-250.00	0.0%
Metro Planner's Lunch Meetings	0.00	0.00	250.00	-250.00	0.0%
Miscellaneous Events	0.00	0.00	300.00	-300.00	0.0%
National Conference Expenses					
All Iowa Reception	0.00	0.00	1,800.00	-1,800.00	0.0%
Total National Conference Expense	0.00	0.00	1,800.00	-1,800.00	0.0%
Sponsorships Expense	0.00	0.00	2,000.00	-2,000.00	0.0%
Equipment Expense	0.00	0.00	50.00	-50.00	0.0%
Insurance Expense	0.00	994.00	1,000.00	-6.00	99.4%
Office Supplies	0.00	50.00	50.00	0.00	100.0%
Postage and Delivery	0.00	40.00	40.00	0.00	100.0%
Professional Fees					
Chapter Administrative Services	600.00	3,000.00	7,200.00	-4,200.00	41.7%
Legal/Accounting/Tax Prep	0.00	150.00	500.00	-350.00	30.0%
Legislative	3,750.00	7,500.00	7,500.00	0.00	100.0%
Total Professional Fees	4,350.00	10,650.00	15,200.00	-4,550.00	70.1%
Software Expense	0.00	160.39	100.00	60.39	160.4%
Training/Continuing Education	100.00	375.00	5,000.00	-4,625.00	7.5%
Travel Expense					
Food	0.00	0.00	900.00	-900.00	0.0%
Lodging	0.00	0.00	2,800.00	-2,800.00	0.0%
Miscellaneous	0.00	0.00	500.00	-500.00	0.0%
Registration	0.00	0.00	1,100.00	-1,100.00	0.0%
Transportation	0.00	0.00	1,500.00	-1,500.00	0.0%
Total Travel Expense	0.00	0.00	6,800.00	-6,800.00	0.0%
Total Expense	4,450.00	13,523.39	81,369.00	-67,845.61	16.6%
Net Income	-4,449.13	-1,710.78	1,006.00	-2,716.78	-170.1%