



**American Planning Association  
Iowa Chapter Board Meeting**

Virtual Meeting Only (Zoom)  
January 15, 2021  
10:00 AM

American Planning Association  
**Iowa Chapter**

*Creating Great Communities for All*

**Join Zoom Meeting**

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Meeting ID: 846 9378 6959

Password: 218824

Find your local number: <https://us02web.zoom.us/j/k6GPcAS2J>

**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-	Charles Connerly
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-      | Leon Begay      |
| • 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, January 15, 2021

4.2 Approval of Minutes of Friday, November 19, 2020 – *Attachment*

## **5.0 APA Iowa Membership Forum/Input**

### **6.0 Business Items**

- 6.1 Discussion and possible action on Diversity/Equity/Inclusion APA-IA Board Training
- 6.2 Consideration of Adoption of 2021 Work Plan – *Attachment*
- 6.3 Discussion and possible action on lobbyist contract - *Attachment*
- 6.4 Consideration of Adoption of 2021 Budget – *Attachment*
- 6.5 Consideration of Adoption of 2021 Legislative Agenda - *Attachment*

### **7.0 Discussion Items**

- 7.1 2021 APA-IA Annual Conference Preparation

### **8.0 Officers Reports**

- 8.1 President (Mullenix)
- 8.2 Vice President (Sturms)
- 8.3 Immediate Past-President (Champ)
- 8.4 Secretary (Micheel)
- 8.5 Treasurer (Young)
  - 8.5.1 Chapter Treasurers Report- *Attachment* - Receive and Accept Report

### **9.0 Executive Board Reports**

- 9.1 Professional Development Officer (Wilwerding)
- 9.2 Planning Board Member (Flack)
- 9.3 University of Iowa (Connerly)
- 9.4 Iowa State University (Owusu)
- 9.5 At Large Representatives (Holz/Nichols/Fleener)
- 9.6 Chapter Development Program (Janson/Russett)
- 9.7 Professional Development (Cowell)
- 9.8 Outreach/Advocacy Program (Schroder/Tiedemann)
- 9.9 Legislative and Policy Program (Van Steenhuyse)
- 9.10 Recognition/Awards Program (Bothell/Shires)
- 9.11 Public Relations/Communication Program (Seabert)
- 9.12 University of Iowa Graduate Program (Begay)
- 9.13 Iowa State University Undergraduate Program (Daniels)
- 9.14 Iowa State University Graduate Program (LaFontant)
- 9.15 County Planning and Zoning Officials of Iowa (VandeLune)
- 9.16 Iowa Floodplain and Stormwater Management Association (Land)

## **10.0 Other Items Not on the Agenda**

### **11.0 Upcoming Board meeting**

March 19, 2021: Location - Zoom

## **12.0 Adjournment of Board Meeting**

**DRAFT Minutes**  
**APA-IA Chapter Board Meeting**  
**Friday, November 20, 2020**

**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
+	Bill Micheel	Secretary
+	Zach Young	Treasurer

*Professional Development Officer*

+	David Wilwerding	
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*Planning Board Member*

+	Trina Flack	
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*University Representatives*

+	Charles Connerly	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
NP	Rose Schroder	Outreach / Advocacy
NP	Steven Van Steenhuyse	Legislative & Policy
+	Charlie Cowell	Recognition / Awards
+	Emily Bothell	Recognition / Awards
NP	Liesl Seabert	Public Relations / Communications

*At-Large Members*

NP	Charlie Nichols	
+	Alexsis Fleener	
NP	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 Kristina (Association Manager).

**4.0 Approval of Agenda and Minutes**

**4.1 Approval of Agenda for Friday, November 20, 2020.**

*Motion by Sturms, seconded by Tiedemann. Unanimous Approval.*

**4.2 Approval of the Minutes, as read, from Friday, September 18, 2020.**

*Motion by Young, seconded by Russett. Unanimous Approval.*

**5.0 APA Iowa Membership Forum/Input**

Mullenix opened the floor for membership input. No discussion.

**6.0 Business Items**

**6.1 Consideration of Appointment of Andre LaFontant as the ISU Graduate Liaison**

Mullenix indicated that the students at ISU appointed Andre.

*Motion by Micheel, seconded Holz, Unanimous Approval.*

**6.2 Consideration of Appointment of Ashlyn Daniels as the ISU Undergraduate Liaison**

*Motion by Micheel, seconded Sturms, Unanimous Approval.*

**7.0 Discussion Items**

**7.1 Diversity/Equity/Inclusion Committee Update**

Russett mentioned that the second Committee meeting was held the day before (11/19/20) and was focused primarily on developing a mission/vision statement for the Committee. The Committee is also interested in organizing some Board training. The Committee is completing research to get a cost estimate for the training and will report to the Board. Cowell added that the group is active and interested and have some big ideas.

Mullenix asked how many members were on the Committee. Russett answered that there are 14 members. Mullenix indicated that the Committee reached out to the Universities to try and create a more diverse membership on the Committee.

Owusu asked how the organization is going to ensure that the Committee's recommendations are implemented and communication between the Committee and the Board occurs and make sustainable change. Mullenix responded that the Committee will provide recommendations on how to accomplish this. Russett mentioned that the Committee would be looking at how other state level chapters have approached this issue.

Micheel asked how the other Committees are memorialized (in the by-laws) and suggested that we amend the by-laws. Cowell indicated that this could be a good solution. Russett indicated that the powers of the Committee would be discussed at the next Committee meeting. Russett also mentioned that the Chapter needs to consider how "DEI" fits into the legislative agenda as well.

## 7.2 2021 Work Plan and Budget

Mullenix indicated that the survey and the notes from the work session are included in the agenda packet. A couple Board members mentioned that the work session was productive.

Mullenix started a discussion on prioritization of work plan items and indicated that everyone should select one or two work plan items that they will focus on and let him know. Mullenix also requested that members let him know if the item(s) they are interested in will require budget resources. Mullenix indicated that the work plan is due in January so we'll consider this in January as well. Young asked that members get back to Dylan by the end of December.

Russett asked how much budget was available for DEI training and if there is a maximum amount that can be allocated to the training. Young mentioned that the Chapter has not used much of the travel budget and as a result, a majority of the \$5000 travel budget may be available for this.

Mullenix mentioned that there will not be an in-person APA National conference in 2021 either and as a result, the 2021 travel budget may be available as well. Young asked Russett to get a rough estimate for the training and it would be discussed at the December Officer's meeting.

Mullenix also mentioned that documenting procedures, duties, and roles of Board members. Mullenix went on to request that each Board member document what their roles have been and had that prepared for the next Board meeting.

## 7.3 APA Upper Midwest Conference Debrief

Sturms said that 500 attendees between the three states. 145 attendees from the Iowa Chapter (including the sponsors who attend for free). The videos are almost complete and available to go back and review on the Whova app and the presentations are on the Chapter website. Still working on the on-demand CM credit certification. Sturms indicated that the Chapter made enough money from the conference to pay for the fee to the Iowa Events Center and came out positive on the overall event, which was, in part, thanks to the sponsors.

Sturms indicated she was asked to participate in a national forum including chapters that conducted alternative conference formats including Missouri that held a partially in-person and partially on-line conference.

Young asked if Sturms knew when the Minnesota Chapter was going to release the funds. Micheel asked if the online experience highlighted anything that we should continue to do after COVID-19 is over. Sturms indicated that the awards videos were well received, the virtual networking events were not successful, and virtual mobile tours are a possibility that came up.

A board member mentioned that there were more people willing to present from multiple states and said that this was one of the best conferences they had attended and other individuals indicated that as well. The quality of presentations was higher. Sturms mentioned that seven presentations were selected from each state to broaden participants' exposure to what other Chapter members are doing. Mullenix mentioned that we should find a way to continue to do some sort of inter-chapter

event each year. Micheel asked if there was interested in doing an Upper-Midwest conference every year as opposed to individual conferences. Mullenix indicated that it worked from a budget standpoint because the three Chapters were able to split the revenue. The conference is the Chapter's largest revenue source, so that idea could be problematic from budgetary standpoint.

Mullenix asked for opinions on the effectiveness of the Whova app. Russett offered that she liked the app and the only issue she noticed was if polls were conducted, that was a problem. Being able to watch sessions from Zoom and Whova was a bit confusing. Holz mentioned that he likes the idea of an app, but isn't convinced that Whova is the right one. He attended the Iowa League of Cities virtual conference and the app they used he thought was better than Whova.

#### 7.4 2021 APA-IA Annual Conference Preparation

Mullenix indicated that this conference was recently pushed back and that some work has already been done (i.e. theme, logo, etc.). Sturms asked Flack how conferences were being planned and asked when we make a decision for in-person, virtual, or hybrid.

Flack responded that it is possible to do an in-person meeting and that the IA Events Center are safer than going to a grocery store because of the COVID protocols in place. Flack mentioned that she would wait until after the first quarter of next year to make these decisions. The IA Events Center has the capability to do a hybrid conference. Sturms asked Flack if we had to use the IA Event Center staff to conduct a virtual/in-person hybrid because the cost of conference AV equipment is expensive. Flack indicated that there is an internal company at the Events Center, but it is not a requirement to use them. Sturms suggested that polling the membership about conference attendance options would be a good thing to do as well to determine who would attend in-person vs. virtually.

Wilwerding offered support for issuing an RFP for the AV equipment to get competitive pricing due to the impact on the budget and to survey the membership to determine demand for in-person attendance to avoid a circumstance in which we hold an in-person conference and experience low attendance.

### **Officers Reports**

#### 8.1 President (Mullenix)

Mullenix thanked the Board membership for a great year. Mullenix will be working on an annual report and a membership survey. Mullenix indicated that he will send the survey out for feedback from the Board. Mullenix reiterated his request for individuals to document their roles on the Board.

#### 8.2 Vice President (Sturms)

Sturms indicated that she has been wrapping up conference related items and has begun planning for next year's conference. Sturms reminded people that Siebert will be out on maternity leave for a period of time, but to send her ideas for the next newsletter.

#### 8.3 Immediate Past-President (Champ)

No report.

8.4 Secretary (Micheel)

No report

8.5 Treasurer (Young)

8.5.1 Chapter Treasurers Report – *Attachment-*

Young mentioned that we have a little over \$42,896 in our account and that does not include the payment from the Minnesota Chapter and will be working on next year's budget.

Receive and Accept Report

*Motion to receive and file the report by Shires, seconded by Micheel*

*Approved unanimously.*

**9.0 Executive Board Reports**

9.1 Professional Development (Wilwerding)

No report.

9.2 Planning Board Member (Flack)

No report.

9.3 University of Iowa (Connerly)

Connerly explained that the U of I is fully online as is the spring semester. The School of Planning & Public Affairs is putting together a DEIA Plan including “Rules for Community” which amount to social norms for how we treat one another.

Connerly also announced that he is planning to retire at the end of June 2021 and a succession committee is working on the next leader of the School of PPA. Finally, Connerly indicated that the School has advertised for a position teaching non-profit management.

9.4 Iowa State University (Owusu)

Owusu indicated that students will not return to campus until Feb. after Thanksgiving. ISU is offering a winter session for students to take classes online including one Planning course. Owusu mentioned that they held a popular online forum for students considering planning.

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

No reports.

9.6 Chapter Development Program (Janson/Russett)

No reports.

9.7 Professional Development (Cowell)

Cowell indicated that the Chapter was approached by the Women in Transportation group and the Chapter will be co-hosting a CM credit event on December 9 on transportation and placemaking. Mullenix mentioned that the Iowa Bike Coalition contacted him about co-hosting their event.

9.8 Outreach / Advocacy Program (Schroder/Tiedemann)

Tiedemann mentioned that she has been working with Cowell on the WTS opportunity.

9.9 Legislative and Policy Program (Van Steenhuyse)

No report.

9.10 Recognition / Awards Program (Bothell/Shires)

No reports.

9.11 Public Relations / Communication Program (Seabert)

No report.

9.12 University of Iowa Graduate Program (Begay)

Begay mentioned that he has been working to determine how many U of I students were interested in AICP certification after graduation. Begay also mentioned that he has been working with National to allow students to register with their “home state” Chapters so they can network in the state they want to work in when they graduate.

9.13 Iowa State University Undergraduate Program (Daniels)

Daniels mentioned that he is working with U of I to plan an event including both ISU and U of I students.

9.14 Iowa State University Graduate Program (Runkel)

Kevin mentioned that

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

Van de Lune indicated that COZO did not continue their contract with their lobbyist. A couple of COZO members are retiring including Tim Huey, Les Beck, and Tom McKee.

9.16 Iowa Floodplain and Stormwater Management Association (Land)

No report.

**10.0 Other Items Not on the Agenda**

**11.0 Upcoming Board Meetings**

The January meeting is scheduled for Friday the 15<sup>th</sup> of January at 10 a.m. Location - Zoom

**12.0 Adjournment of the Board Meeting**

*Mullenix adjourned the meeting.*

\_\_\_\_\_  
Dylan Mullenix, AICP  
President

Date: \_\_\_\_\_

\_\_\_\_\_

Date: \_\_\_\_\_

Madeline Sturms, AICP  
Vice President



COPE MURPHY + CO.

January 6, 2021

Dylan Mullenix, AICP  
President, American Planning Association Iowa Chapter  
420 Watson Powell Jr. Parkway, Suite 200, Des Moines, IA 50309

Via email; [dmullenix@dmampo.org](mailto:dmullenix@dmampo.org)

Dear Mr. Mullenix;

Thank you for the opportunity to submit a proposal to the Iowa Chapter of the American Planning Association to provide government affairs representation before the Iowa Legislature, executive branch, and other key stakeholders. We appreciate your organization's consideration of our firm's qualifications, background and ability to provide high-impact representation to the Iowa Chapter of the APA as the review process moves forward.

#### Overview and Firm Background

Cope Murphy + Co is a well-established lobbying and government affairs in the state of Iowa. The firm's principal partners have nearly fifty years in public policy, client advocacy, and Iowa politics. The firm represents a wide variety of clients before the Iowa legislature, executive branch and other relevant stakeholders, with a heavy emphasis on local governments and local government support organizations; included in our list of current clients are the cities of Cedar Falls, Coralville, the Iowa Association of Councils of Governments, and the Iowa Housing Trust Fund Advocates Network.

Cope Murphy + Co. is focused on providing high touch, responsive representation to clients. As a result, the Iowa Chapter of the APA can expect frequent and timely communications on government affairs activities impacting the organization. Cope Murphy + Co. will work with your organization to create a communication structure that provides maximum information in a manner and timeframe that best fits the organization. APA will be well-informed when issues impacting local governments are moving through the Iowa legislature.

Cope Murphy + Co. is well regarded by both sides of the political aisle in the State Capitol. Both principal partners in the firm have strong relationships with nearly every member of the legislature, as well as key members of the executive branch, and have utilized those relationships to the benefit of their

**cell** Tom Cope 515.975.4590 | Jon Murphy 515.422.6494 | Brice Oakley 515.669.6262

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clients. As a result, APA can expect timely meetings with key legislative leaders, and the ability to impact legislation in a meaningful way.

### Key Personnel

#### *Tom Cope*

Tom Cope is a principal in Cope Murphy + Co. and has worked in state government advocacy in the state of Iowa since 2003. He has worked on a range of issues at the State Capitol, include funding to enhance technology education in Iowa schools, establishment of a permanent funding source for the State Housing Trust Fund, and recognition of legal judgments issued by tribal courts in Iowa.

Prior to his lobbying career, Tom served as chief aide to Iowa Senate Majority Leader Stewart Iverson, Jr., from 1997 to 2003. While working full-time at the State Capitol, he also earned his law degree with honors from Drake Law School in 2002 where he was twice a finalist in the Supreme Court Day Oral Argument competition.

Tom was elected to the Johnston City Council in 2011, where he serves on the Finance/Human Resources and Economic Development committees. He also is a representative for Johnston on the Metropolitan Advisory Committee (MAC), and serves on the executive committee for MAC. He also currently sits on the board for the Metro Waste Authority and previously served on the policy committee for the Des Moines MPO. He has served on the Executive Committee of the Iowa League of Cities since September 2019.

Originally from Aurelia, Iowa, Tom graduated from the University of Iowa in 1991 with a Bachelor's degree in Business Administration. While a student he worked on the 1988 national campaign staff of George Bush for President. Upon graduation, he managed Congressman Jim Leach's 1992 and 1994 re-election campaigns, and was his District Office Director in 1995. In 1996, he became the Communications Director for the Republican Party of Iowa.

#### *Jon Murphy*

Jon Murphy is a principal in Cope Murphy + Co. and has over 20 years of experience in politics, public policy development, and issue advocacy. Prior to Cope Murphy + Co., Jon served as the Director of Government Affairs at the government and public firm PolicyWorks LLC, representing clients at the State Capitol in the area of financial services, but also with several not-for-profit clients. Jon experience



also includes service as the Director of the Iowa Office for State-Federal Relations (OSFR) from 2007 to 2011, acting as the state's point person with the federal government, including during the historic flooding of 2008 and the Great Recession of 2009. From 2001 to 2007, Jon was the Director of Federal Relations for Iowa State University representing the university to Congress and the Administration. Finally, from 1998 to 2001, Jon worked in the Washington D.C. office of Congressman Leonard Boswell and was the lead legislative assistant on several issues, including funding for transportation and infrastructure projects.

Prior to working in public policy development and advocacy, Jon worked on several Democratic campaigns for political offices at the local, state and federal level. Jon was also the Democratic candidate of State Auditor in 2010 and is a graduate of Iowa State University with a degree in Political Science.

#### Ability to Work Across Party Lines

Cope Murphy + Co. have a demonstrated ability to work across political lines on behalf of clients. For the entirety of their lobbying and governmental affairs careers, both Tom and Jon have worked with both Democrats and Republicans to pass legislation for clients. At Cope Murphy + Co. it is understood that the best solutions are developed through wide and thorough discussion among key stakeholder groups and impacted constituencies.

Cope Murphy + Co. have numerous examples of working across party lines to achieve legislative success. For example, Jon has worked extensively with legislators to pass legislation to modernize Iowa's Consumer Credit Code (ICCC), as well as bills to help all Iowans better manage their home and business finances. Each of these bills required working with an extensive group of stakeholders, bridging significant gaps in policy positions, and finding compromise solutions. Eventually, these bills passed by overwhelming majorities in both the House and Senate and were signed into law by the Governor.

One of the keys to being able to work across party lines is an ability to work with other interest groups that may be initially opposed to an initiative but, through outreach and compromise, are willing to drop their opposition, easing the pathway for legislation. In 2017, Tom worked on behalf of the Iowa Distillery Alliance on legislation allowing distillers to sell their product by the glass at their distillery. The Iowa Beer Wholesalers had historically opposed this legislation over fears it would water down the three-tier system governing alcohol. However, thanks to Tom's work to build a stronger relationship



with the Beer Wholesalers, they dropped their opposition to this legislation, and this landmark legislation was one of the most significant bipartisan legislation adopted in 2017.

Cope Murphy + Co. would propose an annual fee of \$7,500.00 to provide these services to the Iowa Chapter of the American Planning Association.

If you have any questions about this proposal, please feel free to call Tom at 515-975-4590 or email him at [tomwcope@msn.com](mailto:tomwcope@msn.com).

Sincerely,

Tom W. Cope  
Principal

Jon Murphy  
Principal



# **APA Iowa 2021 Work Plan**

The American Planning Association Iowa Chapter (APA Iowa) is a membership organization of approximately four hundred professional planners, planning educators, planning commissioners and planning students from across the state of Iowa. APA Iowa's mission is to strengthen planning to create thriving communities. We do this through celebration, advocacy, relationships, and education of our members and communities.

This document outlines APA Iowa's work plan for 2021. We intend to work with our partners at the state and national level to complete the following tasks.

## **Engage and Increase Membership**

- Administer a survey of members to determine service needs and member satisfaction [Chapter Development](#)
- Develop content outlining member benefits [Chapter Development/At-Large Member](#)
  - Revisit what is available to all vs. just members
  - Calendar of events on website/social media
- Engage students to increase chances they become members
  - Send specific survey to students to determine needs/awareness/satisfaction [Students/Chapter Development develop](#)
  - Define student member benefits [Advocacy/Students](#)
  - Host virtual 'firm crawls' with student clubs [Advocacy/Students](#)
  - Speak at Iowa State and University of Iowa about APA IA [President/PDO](#)
  - Continue holding mentor match program at the conference [At-Large](#)
  - Participate in job fairs at state universities [Advocacy](#)
- Engage Planning & Zoning Boards
  - Partner with ISU Extension to support P&Z trainings [At-Large/Planning Board](#)
  - Conference outreach to P&Z members
  - Add information about P&Z membership and rates to the chapter website
- Reach out to planning organizations to encourage membership.
  - COGs [At-large Member](#)
  - MPOs/RPAs [At-large Member](#)

### Expand the Profile and Outreach of APA Iowa

- Administer formal communication channels and encourage planners to share successes through these channels [PR, At-Large, Secretary](#)
  - Quarterly newsletter
  - Social media
  - Chapter website
- Support efforts of the chapter's Diversity, Equity, and Inclusion Committee [Chapter Development](#)
- Enhance the chapter's legislative involvement [Legislative](#)
  - Develop a legislative agenda prior to the start of the state legislative session
  - Procure lobbyist support
  - Schedule Governor Proclamation for October Planning Month to coincide with the 2021 Iowa Planning Conference
- Inventory allied organizations and regularly make contact to identify opportunities to collaboration [Outreach/At-Large](#)
  - Legislative support/advocacy assistance
  - Professional development/training
  - Technical assistance offerings
  - Other?
- Administer the chapter awards program [Awards](#)
  - Identify opportunities to highlight award winners (e.g., at Day on the Hill, in newsletter, etc.) [Awards, At-Large, PR](#)
  - Mentor award winners to encourage their application for national awards [Awards](#)
  - Increase emphasis on local planner recognition to help with future FAICP candidates [Awards, At-Large](#)
  - Produce videos highlighting award winners [Awards](#)
  - Expand award winner opportunities [Awards](#)
- Facilitate the Planning Healthy Iowa Communities initiative and be the host for the Active Living Iowa committee [Outreach/John P.](#)
- Explore the development of a technical assistance activity to coincide with the annual conference [Prof. Dev/Outreach/Planning Committee](#)

### Administer the Business of the Chapter

- Develop the 2021 budget and work plan [Treasurer/Officers](#)
- Oversee the contract with the Chapter Administrator [Pres/VP](#)
- Review structure of the board and its roles [Officers](#)
- Define and document roles and responsibilities of APA IA board members and policies/procedures for the organization [Pre/VP](#)
- Maintain chapter finances [Treasurer/Admin](#)
- Develop and provide documentation to APA showing compliance with the Chapter Performance Criteria [Pres](#)
- Facilitate periodic reporting of work plan activities by board members [Secretary](#)

## Encourage Professional Development

- Maintain and administer the Chapter's Certification Maintenance Provider Account in good standing with APA. Including documenting and ensuring all submitted sessions are CM eligible, entering sessions into APA's CM portal, maintain logs and records of all CM sessions as required by the CM Provider Toolkit/APA. Ensure all submitted sessions follow the adopted APA Iowa AICP CM Credit Approval Policy. [PDO](#)
- Assist planners seeking AICP and AICP Candidate certification [PDO](#)
  - Ensure adequate training for the chapter Professional Development Officer.
  - Maintain a library of materials and resources to share with candidates.
  - Regular meetings/presentations with ISU/U of Iowa classes to promote APA Iowa and AICP Candidate program
- Host the Iowa Planning Conference in Des Moines [Admin/Planning committee](#)
  - Engage other organizations like ULI and CoZo in planning/program [Outreach/Engagement Chairs](#)
  - Be more proactive in identifying sessions based on feedback from last conference [Planning Committee](#)
  - Logistical arrangements [Admin](#)
- Determine thresholds, timelines, and policies related to hosting in-person events in light of COVID-19 [Admin](#)
- Host regular virtual professional development events [Professional Development](#)
  - Identify opportunities to include more social/networking opportunities
  - Increase active participation from attendees

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**MEMORANDUM**

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**TO:** APA IOWA BOARD

**FROM:** ZACH YOUNG, TREASURER

**SUBJECT:** FY 2021 BUDGET

**DATE:** JANUARY 11, 2021

The APA Iowa Executive Officers are proposing the attached budget for Fiscal Year 2021. This budget is more ambitious than past years introducing annual sponsorships on the revenue side and several new items on the expense side including an increase in insurance coverage, a diversity and equity training for the board, and retaining a lobbyist. This budget also continues the arrangement with Sickels & Associates to provide Chapter administrative services.

**Revenue Assumptions:**

The proposed FY 2021 Budget assumes total revenues of \$82,375. These revenues are primarily from three sources: APA dues, annual sponsorships, and conference registrations. The proposed budget assumes that APA Iowa will collect \$13,500 in dues. This amount is consistent with dues collected in past years. The proposed budget anticipates securing ten annual sponsorships including six Silver Level, two Gold Level, and two Platinum Level for a total of \$14,000 in annual sponsorships. As of today, we have received one Gold Level and one Silver Level sponsorships. The final major category on the revenue side is conference registrations. The FY 2021 Budget assumes an in-person event and total registrations at \$45,500.

The proposed budget also included a one-time transfer of funds from reserves of \$5,000 to cover the cost of the diversity and equity training for the board.

**Expenditure Assumptions:**

The proposed FY 2021 Budget assumes total expense of \$81,369. In general, most of the expense categories were maintained at similar levels as the previous year's budget. However, there are a few notable changes:

- Conference expenses were increased to reflect an in-person conference in Des Moines where costs are traditionally higher;
- Insurance costs were increased to reflect the need to secure a more appropriate insurance policy to cover Chapter activities;
- The draft budget proposes a diversity and equity training for the board at a cost of \$5,000 (covered by a one-time transfer from the Chapter's reserves); and,
- The draft budget proposes retaining the services of a lobbyist at a cost of \$7,500 to advance the interests of the board at the state and federal levels.

**Conclusion:**

The proposed FY 2021 Budget's intent is to continue to build off the successes of previous years while taking steps to ensure that the membership is attaining the utmost benefit from Chapter expenditures. **It is possible that some of the items on the expenditure side will need to be reevaluated based on the Chapter's ability to secure the assumed level of annual sponsorships.**

Sincerely,

Zach Young, Treasurer  
APA Iowa Chapter

**APA Iowa**  
**FY 2021 Budget - DRAFT**

<b>Income</b>	<b>Budget</b>
All Iowa Reception/Uni Share	\$1,200.00
APA Dues Rebate	\$13,500.00
Transfer from Reserves	\$5,000.00
Annual Sponsorships	
<i>Sliver (\$1,000)</i>	\$6,000.00
<i>Gold (\$1,500)</i>	\$3,000.00
<i>Platinum (\$2,500)</i>	\$5,000.00
Total Annual Sponsorships	\$14,000.00
Conference Income	\$45,500.00
Grant Income	
<i>Call to Action Income</i>	\$1,200.00
<i>Planner4Health Income</i>	\$1,975.00
Total Grant Income	\$3,175.00
Interest Income	\$0.00
Other Income	\$0.00
Total Income	\$82,375.00
<b>Expense</b>	
Bank Charges	\$100.00
CM Dues/Subscriptions	\$1,254.00
Conference Expense	\$44,000.00
Grants Expense	
<i>Call to Action Expense</i>	\$1,200.00
<i>Planner4Health Expense</i>	\$1,975.00
Total Grants Expense	\$3,175.00
Local Advocacy	\$0.00
Lunch and Learns	\$250.00
Metro Planner's Lunch Meetings	\$250.00
Miscellaneous Events	\$300.00
National Conference Expenses	
<i>All Iowa Reception</i>	\$1,800.00
Total National Conference Expenses	\$1,800.00
Sponsorships Expense	\$2,000.00
Training/Continuing Education	\$5,000.00
Equipment Expense	\$50.00
Insurance Expense	\$1,000.00
Office Supplies	\$50.00
Postage and Delivery	\$40.00
Professional Fees	
Chapter Administrative Services	\$7,200.00
Legal/Accounting/Tax Prep	\$500.00
Miscellaneous	\$0.00
Lobbyist	\$7,500.00
Total Professional Fees	\$15,200.00
Software Expense	\$100.00
Travel Expense	
Food	\$900.00
Lodging	\$2,800.00
Miscellaneous	\$500.00
Registration	\$1,100.00
Transportation	\$1,500.00
Total Travel Expense	\$6,800.00
Total Expense	\$81,369.00
Net Income	\$1,006.00



American Planning Association  
Iowa Chapter

## APA Iowa ~~2020~~2021 Legislative Agenda

Making Great Communities Happen

The American Planning Association Iowa Chapter (APA Iowa) is a membership organization of approximately four hundred professional planners, planning educators, planning commissioners and planning students from across the state of Iowa. Please find below APA Iowa's state legislative priorities for ~~2020~~2021. This is not an exhaustive list of critical planning policies important to APA Iowa, but rather reflects items that may be considered during the upcoming legislative session. For more information, please contact APA Iowa Legislative Program Chair Steven Van Steenhuyse, AICP ([svansteenhuyse@masoncity.net](mailto:svansteenhuyse@masoncity.net), 641-421-3626). For more information about APA Iowa, please visit [www.iowa-apa.org](http://www.iowa-apa.org).

Policy Item	APA Iowa Position
Economic Development	Recognizes that tax increment financing is an important tool for local governments and supports the flexibility provided under current law. Supports legislation, policies, programs, and funding that allow communities to attract and sustain quality jobs that provide livable and equitable wages to the workforce.
Water Quality and Conservation	Supports funding and programs that facilitate and encourage nutrient reduction in Iowa's water bodies and improve Iowa's water quality. Furthermore, APA Iowa supports watershed-level planning that address urban and rural water quality, flood mitigation, and water recreation.
Smart Planning Principles	Supports comprehensive planning and the Smart Planning Principles outlined in Iowa Code, and opposes any legislation to remove or weaken the practice of sound planning in Iowa's communities.
Recreation and Cultural Programs	Supports programs and funding or incentives that encourage economic development and provide a higher quality of life to attract and retain residents. This includes support and additional funding for the Enhance Iowa program, historic preservation, and cultural programs such as Iowa Great Places.
Brownfield/Grayfield Redevelopment	Supports efforts and funding to enhance the Brownfield and Grayfield Redevelopment programs to encourage sustainable development and to revitalize blighted and distressed areas.
Local Control of Planning Issues	Believes local jurisdictions should have control on planning issues and opposes legislation that mandates regulations or limits local planning and zoning powers. Examples include regulation of adult oriented businesses, residential occupancy restrictions, firework legalization, and cellular tower/small cell placement.
Livable Communities	Supports state policies that seek to improve quality of life by promoting development of safe, accessible, and vibrant environments. Policies could address sustainable land use, mixed use developments, multigenerational and affordable housing, alternative transportation, and efforts to help residents age in place. <a href="#">APA-Iowa supports legislation to enable land banking and similar community-based programs to address blight and disinvestment.</a>
Housing	Supports increased investment in affordable housing programs, including the State Housing Trust Fund, Workforce Housing Tax Credits, and other programs that provide quality housing for low and moderate income families, reduce barriers to homeownership, and support the modification of homes to help people age in place.
Environmental Sustainability and Climate	Supports state policies that encourage and incentivize use of sustainable energy from renewable sources, programs that prevent or mitigate the impacts of climate change, and programs that protect the environment.

APA Iowa  
Profit and Loss Budget vs. Actual  
January through December 2020

	Dec '20	YTD	Budget	\$ Budget	% Budget
<b>Income</b>					
All Iowa Reception/Uni Share	0.00	1,200.00	1,200.00	0.00	100.0%
APA Dues Rebate	0.00	13,587.23	12,500.00	1,087.23	108.7%
Conference Income	10,243.98	18,998.54	44,500.00	-25,501.46	42.7%
<b>Grant Income</b>					
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	0.85	13.75	5.00	8.75	275.0%
Other Income	0.00	0.00	500.00	-500.00	0.0%
<b>Total Income</b>	<b>10,244.83</b>	<b>33,799.52</b>	<b>61,880.00</b>	<b>-28,080.48</b>	<b>54.6%</b>
<b>Expense</b>					
Bank Charges	0.00	113.42			
CM Dues/Subscriptions	0.00	0.00	1,254.00	-1,254.00	0.0%
Conference Expense	0.00	8,101.38	36,220.00	-28,118.62	22.4%
<b>Grants Expense</b>					
Call to Action Expense	0.00	0.00	1,500.00	-1,500.00	0.0%
Planner4Health Expense	0.00	0.00	1,975.00	-1,975.00	0.0%
Total Grants Expense	0.00	0.00	3,475.00	-3,475.00	0.0%
Local Advocacy	0.00	0.00	50.00	-50.00	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	68.00	300.00	-232.00	22.7%
<b>National Conference Expenses</b>					
All Iowa Reception	0.00	533.10	1,800.00	-1,266.90	29.6%
Total National Conference Expense:	0.00	533.10	1,800.00	-1,266.90	29.6%
Sponsorships Expense	0.00	2,000.00	2,000.00	0.00	100.0%
Equipment Expense	0.00	0.00	100.00	-100.00	0.0%
Insurance Expense	0.00	390.00	400.00	-10.00	97.5%
Office Supplies	0.00	24.10	100.00	-75.90	24.1%
Postage and Delivery	0.00	0.00	100.00	-100.00	0.0%
<b>Professional Fees</b>					
Chapter Administrative Services	600.00	7,200.00	7,200.00	0.00	100.0%
Legal/Accounting/Tax Prep	0.00	750.00	500.00	250.00	150.0%
Miscellaneous	0.00	0.00			
Web Consulting	0.00	62.50			
Total Professional Fees	600.00	8,012.50	7,700.00	312.50	104.1%
Software Expense	0.00	215.07	100.00	115.07	215.1%
Training/Continuing Education	0.00	700.00	500.00	200.00	140.0%
<b>Travel Expense</b>					
Food	0.00	0.00	900.00	-900.00	0.0%
Lodging	0.00	19.99	2,800.00	-2,780.01	0.7%
Miscellaneous	0.00	0.00	500.00	-500.00	0.0%
Registration	0.00	850.00	1,100.00	-250.00	77.3%
Transportation	0.00	471.58	1,500.00	-1,028.42	31.4%
Total Travel Expense	0.00	1,341.57	6,800.00	-5,458.43	19.7%
<b>Total Expense</b>	<b>600.00</b>	<b>21,499.14</b>	<b>61,399.00</b>	<b>-39,899.86</b>	<b>35.0%</b>
<b>Net Income</b>	<b>9,644.83</b>	<b>12,300.38</b>	<b>481.00</b>	<b>11,819.38</b>	<b>2,557.3%</b>

APA Iowa  
Balance Sheet Standard  
As of December 31, 2020

	<u>Dec 31, '20</u>
<b>ASSETS</b>	
Current Assets	
Checking/Savings	
Bank Iowa	52,171.99
Total Checking/Savings	<u>52,171.99</u>
 Total Current Assets	 <u>52,171.99</u>
 TOTAL ASSETS	 <u><u>52,171.99</u></u>
<b>LIABILITIES &amp; EQUITY</b>	
Equity	
Opening Balance Equity	39,871.61
Net Income	12,300.38
Total Equity	<u>52,171.99</u>
 TOTAL LIABILITIES & EQ...	 <u><u>52,171.99</u></u>