



American Planning Association

Making Great Communities Happen

APA Board of Directors - Committee & Task Force Report

BOARD MEETING

DATE: April 26, 2014

TO: APA Board of Directors

FROM: APA Retired Member Task Force
Kara Drane, AICP, Chair

SUBJECT: **Retired Member Task Force Report**

ADOPTED POLICY:
No

TYPE OF REPORT:

☒ Action

☐ Information

CONSENT AGENDA

☐ Yes

☒ No

FISCAL NOTE:

All activities will be funded from the adopted budget for 2015. Some recommendations of this report include expenditures for a survey of older members.

DEVELOPMENT PLAN:

GOAL 3, STRATEGY 3.2: Have wise and seasoned professionals both learn and impart knowledge through active involvement with the next generation of planners, and engage FAICP members in a more substantive way.

RECOMMENDATION:

That the Board adopt the recommendations of this report.

ACTION REQUESTED OF THE BOARD:

That the Board adopt the recommendations of this report.

EXECUTIVE SUMMARY:

This task force was charged to develop a strategy for retaining retired planners as members and providing value through volunteerism, study travel, mentoring, and other

services.

Meetings were held through a series of conference calls between February and April, 2014. The aging population of the U.S., and changing demographics of APA membership, suggest that APA address the large cohort of retiring baby boomers. Our approach was to look for programs that could be implemented through the Development Plan, and to recommend these to the Board.

The task force members agreed that pricing was not the primary issue for retired members, since APA has already instituted significant discounts for such members. Among the items in the charge to the task force, retaining retired planners was not considered to be the first concern. Rather, the task force felt that engagement and encouraging and providing opportunity for volunteerism and mentoring were the highest priority, and would ultimately result in greater retention of older members. A summary of the recommended strategies for addressing the needs of retired members is as follows:

Ask Them. Members that are retired and nearing retirement age should be surveyed to determine how APA could better meet their needs and to identify how these members want to be engaged with APA. The survey could serve as market research for new study travel opportunities. The theme of “ask them” is woven throughout this report and is a central message to the Board. That is, the task forces feels, at both the national level and the chapter level, there is a major opportunity to engage this group if we just “ask them.”

Communicate With Them. Create publication content specific to life of retired members, such as planning for retirement, testimonials, and historic planning successes led by planners who are now retired. Publications should also do more to promote the existing discounted membership categories and conference discounts available to retired planners.

Create a Unique Conference Experience. Create special conference sessions on things like emerging technology, including web-based GIS applications and social media, that retired members are curious about, but may not have used during their careers. Consider creating a conference tract for older planners. Give retired members a role to play at the conference that uses their expertise, so that both learning and teaching opportunities are offered to this group.

Offer Volunteer Programs for Mentoring and Engagement. Develop opportunities for outreach and engagement (including volunteering) at the chapter level and the national level, including one-on-one mentoring of younger planners, participation in community assistance teams, and outreach to high schools and community colleges.

Background:

As many APA members of the baby boomer generation transition to their post-career lives, APA must learn how to keep them involved. This is an issue facing many membership organizations. To be effective in retaining these members, we should tailor engagement opportunities to the changing needs of new retirees. According to the American Society of Association Executives¹, some of the key issues are as follows:

- Health and finance have a real impact. Health concerns may loom large for some, so retirees are less likely to volunteer for long-term roles requiring travel, while short-term, local chapter engagement becomes more appealing.
- Community is more important than ever. Many retired members have built friendships in the profession over many years. Membership for retirees means a focus on peer-to-peer interaction, keeping in contact, and knowing what's going on in your profession.
- "Retired" is just a job status. Retired members who volunteer want to do something meaningful, comparable to the professional work they did and challenging and respectful of their credentials.

The College of Fellows of AICP has an Engagement Strategy, which is available here: <http://www.planning.org/faicp/involvement.htm> via the link called "Engagement Strategy". Several goals and strategies for engaging the College of Fellows of AICP are also relevant to retired and life members of APA; such as Goal 3 – Create Opportunities for Fellows to Mentor and Goal 4 – Expand Interaction Among Members of the College of Fellows.

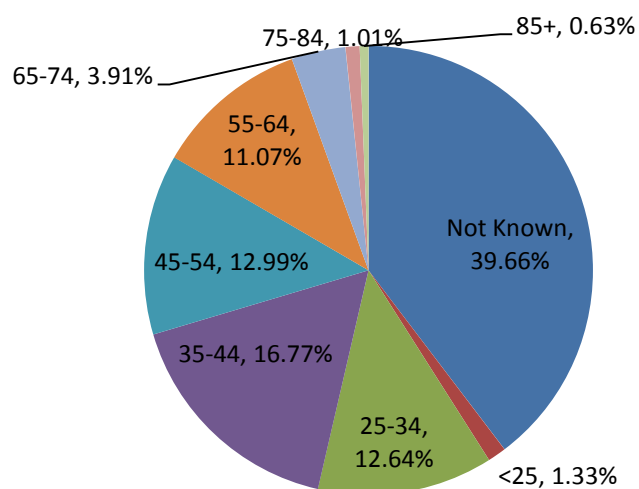
¹ Associations Now, Nov/Dec 2013, "3 Tips for Keeping Retirees Engaged"

Existing Data on APA Retired Members:

- Today, of about 37,000 APA members, 426 (1.1%) are of the member type Retired (1.1%) and 853 are the member type Life (2.3%).
- To be eligible for Retired Membership, you must have been a member of APA or AICP (current and continuous for 10 or more years); be 65 or older; and retired from profession-related employment. Retirement dues rates: APA dues \$75, Chapter dues \$10, AICP (if applicable) \$25.
- APA also offers Life Membership. To be an APA Life member, you must be 65 or older and have been an active (current and continuous) member of APA for the past 25 years or more. Life member rates: APA \$50, Chapter \$10, and AICP (if applicable) \$15. All publication and division fees are at standard price.
- APA offers a discount on conference registration. Retired/Life members get the same discount as Students and New Professionals at the National Planning Conference. Early bird registration for these categories is \$125 for the main conference registration. Typically very few conference attendees are Retired members. In Chicago, Retired members represented 0.3% of attendees, they were 17 of more than 5,500 registered.
- Currently, we do not have other discounts specific to Retired members. All publications and divisions fees are at standard member price.
- Among ALL APA members (including Students, Free Students, and those who didn't provide any data, at least 11% are aged 55-64. (Figure 1.) Among a recent random sample of Regular Members, for our Member Survey, the number aged 55-64 is 27%. (Figure 2.) From the latest membership survey, we do have some data about the high satisfaction of current members over age 55; this could be attributed to their long tenure as members of APA and general support of APA.

Figure 1

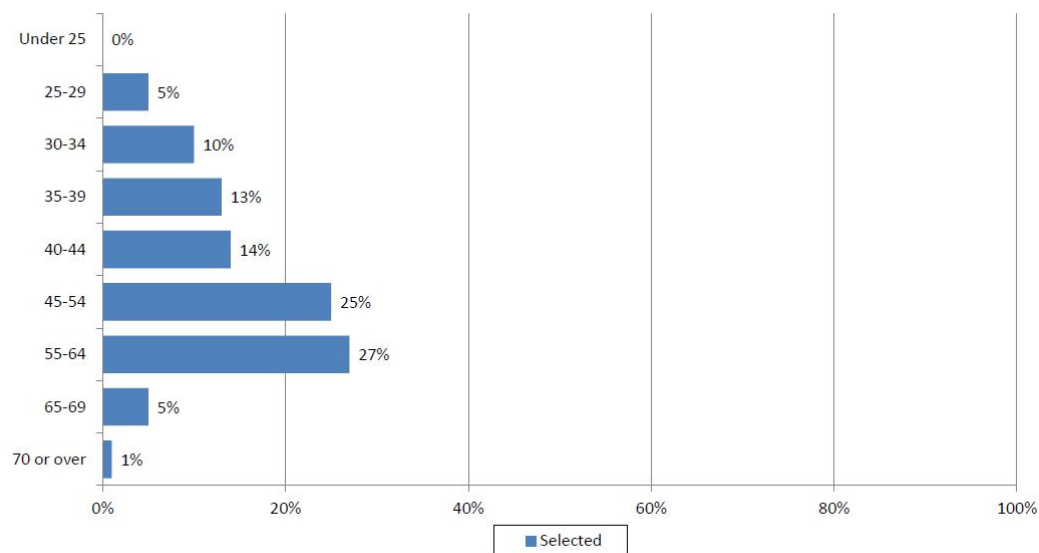
Age of All APA Members (Including Free Students)



Source: Membership Data, February 2014

Figure 2.

Among Regular Members, the age distribution is quite different.



Source: APA Member Survey 2013

RECOMMENDATIONS:

Strategy 1: Ask Them

Action 1.1: APA should survey members who are retired and nearing retirement age. The purpose of the survey is to ask them about what products and services they would like to see developed, and how they would like to be involved in APA. The survey can ask these members how APA could better meet their needs. The survey could serve as market research for new study travel opportunities. If the Task Force continues past the April, 2014 National Conference, the group could assist with the development of the survey and the implementation. Specifically ask those surveyed about their opinions about networking opportunities, and how they would like to stay engaged in APA.

Strategy 2: Communicate With Them

Action 2.1: Develop a communications strategy to deliver content aimed at late-career or retired members for publication in interact and chapter and division newsletters. It could include topics of interest to this age group such as planning for retirement, opportunities to be (stay) involved in APA at the national and chapter levels, testimonials about how rewarding it is or has been to be involved in APA, and historical planning successes led by planners who are now retired.

Action 2.2: APA should get the word out and better publicize discounts for membership and discounts on other things. Discounts could be added for APA study travel programs, books, and other programs. APA could run house ads in Planning magazine, to raise awareness of the availability of Retired or Life Membership. Currently, invoices sent to members has one sentence that says APA “offers special reduced rates for retired and life members” but doesn’t provide any additional information on the meaning of retired and life or the rates. Revising this section on member invoices is one simple way to more effectively communicate these special reduced rates for retired and life members.

Strategy 3: Build a Unique Conference Experience

Action 3.1: Focus National Planning Conference marketing to this segment, around the theme of reuniting with old friends, fellowship with planning colleagues and giving back to the profession through engagement and outreach programs and new learning experiences. Highlight ways, such as volunteering for mobile workshops, retired members can play a role in the national conference and be involved.

Action 3.2: Create a track at the National Conference for those nearing retirement age and

retired planners to give them a role at the National Conference. This can include session topics of interest to that age group, such as emerging technology, including web-based GIS applications and social media, which retired members are curious about but may not have used during their careers. It can also include sessions on things to consider for your planning career as you near retirement, and examples of opportunities for continuing participation in the profession following retirement. Session topics can also include topics that this age group would be interested in presenting – worst mistakes made session; historic trends in planning; dealing with the politics of planning; etc. These sessions could include a number of retired members as organizers, researchers, and presenters.

This special track could include mobile workshops geared toward the interests of retired and life members. These could be organized over a two-day period at the conference, to reduce the number of nights that discounted attendees need to travel. A unique facilitated discussion could be added to provide several retired and life members opportunities to share some special components of their careers. This would offer a way to recognize accomplishments of retired and life members, acknowledge their careers and celebrate their work. Students, young planners and emerging professionals could learn from retired members and their experiences.

Action 3.3: Market a post-conference event or a pre-conference event such as the Portland and Vancouver events being considered in Seattle, offering a special rate or focused program for those retired members with both the ability to travel and the availability of more free time.

Action 3.4: Promote the AICP Community Assistance Program Workshop at the National Conference to retired members and those nearing retirement. The program would benefit from such experienced professionals. This would create opportunities for networking with their colleagues and these planners would be a mentor to the younger planners participating in the event. Their role at these workshops could be highlighted as a specialized group within the workshop that brings a “seasoned/wise” perspective to the event.

Action 3.5: Consider a means for retired members to re-connect with old friends at the National Conference. The Conference could become a “standing reunion” of sorts; maybe just a meeting place could be offered so that retired members can re-establish both personal and professional connections at the Conference.

Strategy 4: Offer Volunteer Programs for Mentoring and Engagement at the National and Chapter levels

Action 4.1: Encourage retired members to participate in Community Planning Assistance Teams.

Action 4.2: Establish a network of retired planners who are willing to provide a guided planning tour of their local area to visiting planners from other cities. This could apply not only to American cities, but also foreign destinations where retired APA members reside.

Action 4.3: Establish a High School/Community College Outreach Program with local chapters, to provide opportunities for retired members and those nearing retirement to outreach to high schools and community college students in the local communities. Retired members could partner with current planning students who participate and promote various university and college planning programs. The outcomes would include networking opportunities with retired members, growth for the planning profession and increased diversity within the planning profession by reaching diverse youth populations.

Action 4.4: Encourage chapters to create a list of retired members who are willing to participate in one-on-one mentoring of practicing planners within the local area. Any planner who is facing a new challenge or feels the need to improve his/her performance in an existing job could request a consultation with an experienced retired planner for a few hours or a few days. Emphasis would be on process issues such as work program design and management, dealing with a difficult boss, interrelating with other professionals, etc. In addition to meeting with the concerned planner, the mentor could observe operations and interview other key members of the local organization. For example, a retired planning director may be asked to advise a new planning director on ways to be most effective within the governmental structure, how to work effectively with other directors, how to create and manage an annual work program, etc. This program could be established with expenses for travel to be covered by the local community.

Chapters Leading the Way

There is a potential model for a program for retired members. The APA California chapter has a group known as the Planner Emeritus Network (PEN), a group of planners who are not necessarily retired, some still working (former chapter leaders and others are invited to participate). It is an older group that does several different activities. It has a place on the chapter conference program to put together a session on an important planning topic.

The planners involved in PEN develop that portion of the program and work together in an effort that includes a number of volunteers. There is also a social/networking aspect to it, and an awards program to recognize the accomplishments of those members who may not have been recognized as Fellows, but are accomplished planners. In the PEN model, those invited include former leaders of the chapter board. Membership is automatic for those who are retired, but participation is optional. Appendix 1, California Planners Emeritus



Network, details this unique chapter program.

In March, 2014, all chapters and divisions were asked by the task force to share ways retired members or those nearing retirement are engaged in the chapter/division and what programs, if any, they had for these members. The comments received are included in Appendix 2. Other comments received from chapters include a recurring theme of the need to reach out to this segment of planners. In other words, as was stated previously in this report, APA need to “ask” this group to be engaged.

Those chapters who had some program reported positive response to their attempts. In addition to the California success story, the Texas Chapter reported successes in community volunteer programs and mentor/mentee match programs using retired planners. Texas also mentioned travel abroad opportunities, friendship networks and health insurance programs to be future ideas that should be pursued, and the task force agrees.



APA RETIRED MEMBER TASK FORCE ROSTER

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APPENDIX 1: APA California's Planner Emeritus Network

APA California Planner Emeritus Network

Planner Emeritus Network (PEN) is a subsidiary of APA California Chapter (APACA) and is supported financially by the APACA. There are no additional dues for members of PEN. PEN represents a body of long-tenured members of APACA who are available to provide to the APACA Board and to other APA California groups substantial knowledge of the profession as it has matured in California, in particular. PEN members also are available to provide their personal insights, experiences and planning history when requested by the APACA Board or other organizations, groups and individuals.

Membership in PEN includes the members of APACA who are:

- *Life Members* of the American Planning Association, as defined by APA's national offices to include those members who are over the age of 65 and have twenty-five years of continuous membership in APA;
- *Retired Members of APA*;
- *Former state-wide elected Board officers of APACA*;
- *Fellows* of the College of the American Institute of Certified Planners (FAICP) from California;
- *Members of the former California Planning Historical Society* or a successor organization;
- *The APACA Chapter Historian*; and
- Such other members of APACA that the PEN Executive Board of Directors may from time to time determine as appropriate members of PEN, including but not limited to, past or present officers of PEN.

PEN was organized in 1997 and developed formalized bylaws in 2000. The organization is led by an Executive Board of Directors composed of the President, two Vice-Presidents (one each from the northern and southern parts of California), and the Secretary-Treasurer. The PEN Executive Board may also expand the Board by appointing not more than six additional members.

The PEN Board meets annually at the APACA Conference. Other communications are conducted by phone, email or other electronic communications throughout the year. PEN has three standing committees:

1. The Planning History Committee which is chaired by the Chapter Historian appointed by the President of APACA. The Chapter Historian is a member of PEN. The Planning History Committee recommends to the Historian, potential Planning Landmark and Planning Pioneer candidates for Chapter Historical Awards in accord with AICP guidelines. The Historian works with applicants to develop their award nominations.
2. The Honors Committee is appointed by the PEN President each year and consists of three PEN members. Each year the PEN Honors Committee nominates planners for special recognition. Persons receiving recognition are selected by the Board for an outstanding contribution to the planning profession or for a significant accomplishment that enhanced the recognition of planning. Awards are presented to the honorees at the Awards Luncheon at the annual APACA conference.
3. The Conference Session Committee which is appointed by the PEN President each year. This committee is responsible for developing and conducting a 1.25-hour by-right session on a topic of interest to practicing professional planners at the annual APACA Conference.

**APPENDIX 2 – Chapter and Division Responses – Programs to Engage Retired Members:**

Question: How are retired members or members nearing retirement age engaged in the chapter? Describe any specific programs, if any, the chapter has targeted toward planners in these age groups.

From: Lydia Z. Jemison, AICP; APA Louisiana Chapter President

The APA LA has many retired chapter members at or near retirement that are actively engaged with chapter activities. Several chapter members in this category recently devoted a huge amount of effort in planning our annual conference conducted in New Orleans in January of 2014. We show our appreciation of retired and near-retirement members verbally and by bestowing formal awards. At the 2014 Annual Conference, we gave one of retired members the 2014 APA LA Lifetime Award. She was very surprised and deeply honored.

I have a suggestion for national APA to keep chapter members at or near retirement involved in planning. If members in this category are nominated for the AICP College of Fellows and meet the criteria, they should be accepted. There is nothing that discourages such members more than to be denied the FAICP distinction. This happened to two of our very deserving, outstanding chapter members this year and it's hard to understand.

Hope this is helpful. Treasuring our retired or near-retirement members is a grand policy. Such members have given and have so much to give to planning. And sooner rather later, we are all going to be in this membership category!

From: Ben Hitchings, AICP; APA North Carolina Chapter President

Great question. APA-NC does not have a specific program that targets retired members or members nearing retirement for involvement in Chapter programs. However, I keep an informal lookout for these folks and try to look for ways to involve them in our work. For example, we tapped retired Raleigh Planning Director, George Chapman, to serve as a member of our expert panel for our Great Places in North Carolina program. We also contracted with retired Durham Assistant Planning Director to be our part-time paid Chapter Administrator.

We have lots of involvement opportunities. Right now, it's largely up to retired planners to initiate participation, but that's a good idea to be more systematic about reaching out to this group.

Forwarded by: Lawrence T Ward, Jr. AICP; APA Wisconsin Chapter President

I can only speak for myself, but I have a hunch that many retired members will be willing to participate in Chapter activities if and when requested. One activity that retired members might be particularly useful for is mentoring activities. The downside, of course, is that being out of the mainstream for awhile may reduce the applicability of what retired members have to offer. (NOTE: The APA Wisconsin chapter has a program, described in the attached flyer.)

From: George M. Homewood, AICP; APA Virginia Chapter President

We have several retired members who are still involved in the Chapter. Three (Angela Harper, Al Riutort, and Jim Zook) are members of our FAICP Committee. They and others participate occasionally in our conferences and section events. I note that there are others who remain APA members, but am not aware that they participate in the Chapter.

We have no specific programs for retired members, though Terry Holzheimer prior to his untimely passing, was beginning the process of trying to organize them into a Virginia CPAT.

From: George Homewood, AICP; APA Virginia Chapter President

On Monday 24 February 2014 during a break in the PAB visit to VCU, I had a somewhat extended conversation with Terry Holzheimer about his vision of developing Virginia's cadre of retired planning directors and Fellows (this was before we knew we would have so many new Fellows) into a Virginia-focused CPAT that could offer 1-3 smaller localities or entities each year with technical planning assistance. Terry's vision was that it wouldn't be free—pretty close to his exact words would be: "People don't value things that they don't pay for"—but neither would it be cost-prohibitive with the costs going to pay for graphical and GIS support and if a CPAT place could provide them as in-kind services, so much the better. Terry's vision included him ensuring that the projects were leavened at least to some degree with economic and market realities which of course can no longer happen.

Frankly, I think Terry laid out a pretty good road map for how we could get to a Chapter-focused CPAT just days before his untimely passing. One change I'd suggest—and I had not thought of it until driving home from VCU that day after the PAB visit so never mentioned it to Terry (as with far too many things in life, I assumed that there would be plenty of time for that later)—is to try to engage our SRC and YPG in the effort. They bring so much technical talent with computer graphics, simulations, etc. and what a wonderful mentoring opportunity for them as well.

In any case, I have asked Jim Zook (FAICP and retired Fairfax County Planning Director) if he would consider in conjunction with Angela Harper, FAICP and Al Riutort, FAICP (both retired planning directors) taking on the challenge of breathing life into Terry's vision. There would be lots of detail which I would be willing to help with, both personally and by asking the Chapter for support. I believe that all three of these folks will be in Atlanta for the FAICP installation so we could perhaps arrange a conversation if that would be of interest to you.

From: Brian Campbell, FAICP; APA Oregon Chapter President

At this point there are no specific programs or activities targeted at retired planners in Oregon. We have formed a Membership Committee recently and they will be looking at ways to better involve a number of sub-groups, but retirees have not been discussed. It will be interesting to hear what the Task Force comes up with.

From: Lisa Verner, FAICP APA Washington Past President

So, what do we here in Washington State do?? We used to have a "Senior Action Committee" with a chair who was an ex-officio Chapter Board member. SAC reports were included in Chapter Board packets and discussion of work items was held as we discussed annual work plans. The group put together a history of planning in Washington State

and kept tabs on current planning trends. This was in 2001-2003 during my presidency and, honestly, I don't remember what else they did. The group has been disbanded for a few years. Now, I don't believe we do any direct outreach to retired planners, as such. Obviously, we want their participation, and some do participate (chapter AICP Fellows nomination committee, conference speakers, mentoring, others), but the initiative comes from them. I'm not aware that there's any "senior" activity in any of our four "sections" across the state either. - Lisa S. Verner, FAICP

From: Wendy D. Shabay, AICP; APA Texas Chapter President

In the Texas Chapter, many of our Life and Retired members continue to participate as speakers, moderators or resources in discussion groups or formal sessions on planning sponsored by the Texas Chapter of APA and our 9 regional Sections. Retired and Life members include many who are only semi-retired and continue to work as consultants, volunteers and temporary positions as interim planning managers under contract to municipalities, and involved in the non-profit sector for charitable and educational agencies. Some members volunteer their senior planning skills to help small communities develop a planning program, where otherwise the communities either do not have the resources or inclination to develop the basic planning tools. By doing pro bono work for the smaller cities that could not otherwise afford planning services, they collect planning data, analyze possibilities and summarize recommendations in a "Plan for Planning" that the community can use to invigorate or re-invigorate their local planning effort. They act as a catalyst to help the city officials to focus their resources and begin that process, acting as the "Johnny Appleseed" for small town and rural Texas planning. Acting as mentors, they are able to add perspective about how we got to where they are. A common motivation for remaining active in APA after retirement is the desire to maintain relationships with their peers and friends in the planning network.

Programs that the Texas Chapter currently provides for Retired and Life members include reduced Chapter membership annual dues (\$10 compared to \$40 for regular members), and opportunities to participate in Chapter and Section sessions as speakers or moderators. The Chapter is currently considering a new initiative to recognize senior members who have 30 or more years of continuous APA membership. Engaging AICP Fellows in Chapter and Section activities is a related objective. Reduced registration fees for Chapter Conferences might be considered. The Chapters "Emerging Planning Leaders" group is proposing a Mentorship program that will form "Families" of mentors and several mentees. New services that APA might provide to Life and Retired members might include information about effective planning for their individual retirement, including options for economical group supplemental Medicare and health insurance. APA might also re-exam the criteria for Life and Retired member categories to consider the changing status of "retired planners" who will continue to have some involvement in the planning profession.



RETIREE RECOGNITION FORM

Nominations should be submitted to:

Deadline: April 23, 2014

APA-WI Retirees
c/o Carolyn Esswein
SARUP
PO Box 413, Milwaukee, WI 53201
cesswein@uwm.edu

The Wisconsin Chapter of the American Planning Association would like to recognize current and former members for their contributions to the planning profession. If you have retired in the past few years, complete this form and fax or return it to the address above. If you need additional room, please write the information on the back of this form.

Retiree Information

I certify that I am or was a member of the Wisconsin Chapter of APA.

Signature

Date

Print Name

Address

City / State / Zip

Phone

email

Words of Wisdom....biggest lesson you learned during your career that you'd like to share with other planners.

Employment History

Please list your employment starting with your most recent position.

(Example: City Senior Planner, 1995 to 2009)

Education

Please list all your educational degrees.

(Example: University of X, MUP, 1970)

Recognition will be at the APA-WI Conference,
June 12th in Madison.

For more information please visit
www.wisconsinplanners.org