



# Private Planning Perspectives

**Spring 2004**

- 2 Strategic Planning
- 3 Dark & Stormy Planning  
Prose
- 4 All-time Greatest  
Planning Books
- 6 Plannerese Dictionary
- 8 Reinventing Planning
- 11 Rational Management
- 12 Charrettes
- 14 Division Bylaws



*Private Planning Perspectives* is the newsletter of the Private Practice Division of the American Planning Association and the American Society of Consulting Planners  
[www.PrivatePracticePlanning.org](http://www.PrivatePracticePlanning.org)

## Client

*Person who hires the services of a professional*

## Consumer

*Someone who uses articles made by another*

## Constituent

*Voter represented by an office-holder*





# Strategic Planning

*From Management of Local Planning  
By International City Management Association  
& Frank S. So*

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**A**ny definition of planning that refers to a specific sphere of activity will obviously be of limited usefulness; only conceptual descriptions can cover the diverse political, social economic, visual and geographical settings in which local planning takes place. These settings have a bearing on the way in which the planning process will be organized and staffed and on the methods that will be used to carry it out. Most conceptual definitions of planning equate it with a process that consists of at least the following steps;

1. Determining goals to be achieved within a given time
2. Describing measurable objectives to be achieved
3. Describing standards to be used or products to be manufactured in accordance with the standards
4. Drawing on a body of knowledge embracing methodologies and techniques for conducting the activities of the government
5. Monitoring activities on a predetermined schedule to evaluate progress toward objectives
6. Maintaining retrievable records so that the process can be replicated or altered and tried again

Mores specific definitions of planning generally apply only to selected political, economic, functional, or geographic areas. For example, if the housing planning process were described in sufficient detail for someone to prepare a housing plan, the methodology would include an analysis of housing units authorized by the building code for an area. Meanwhile, the highway planning process would include a detailed analysis of soil conditions that would not be included in the housing plan. The conceptual definition of planning, then is

based on the many functions of a government or a private enterprise, but the specific definition is based on the needs of the organization. Thus, the recreation planning process is described in detail in recreation planning texts and the body of knowledge known to professional recreation staffs both refer to recreation planning at any given time. Similarly, public safety planning is a generic term for a process that may take place in various settings, for example, the criminal justice system or the fire prevention and control system. The comprehensive planning process draws on the standards, methodologies, techniques, and body of knowledge of many professions and disciplines to balance functional plans within an integrated comprehensive plan. Then, for purposes of implementation, the plan is disaggregated into a series of budget allocations, personnel decisions, equipment purchases, and day-to-day operational decisions that cumulatively may make it possible to achieve the objectives described in the comprehensive plan.

In a relatively stable economic, regulatory, and consumer environment, the emphasis of the planning process is on day-to-day operations. Delivery of a product or a service to a well-defined market in this environment does not require as much top-down (strategic) planning by a private or municipal corporation. As the economic, regulatory, or consumer environment becomes more competitive, however, managers at the top of the organization assess strategic plans frequently in the light of new information and changed conditions.

Many of these conditions are outside the span of direct local government control; these might be interest rates, energy pricing, construction costs, state and federal grant regulations, consumer preferences, and a host of other



factors that influence the provision of public services and private goods. Technically they are exogenous, or outside, variables that many local governments do not even observe, much less control. An important part of top management's strategic planning, then is to consider the effects of these exogenous variables on management and planning decisions. *The more unstable these variables are, the greater the emphasis must be on top management strategic planning.*

## What is strategic planning?

Strategic planners often use a variety of techniques of group dynamics to arrive at consensus. Thus, the government strategic planner may have to shift his role slightly from being a proposer of policies and plans (which he then tries to sell) to being a facilitator of a strategic planning process.

The strategic planner must also be incisive, never using a lack of data as an excuse for inaction. In other words, the planner must get to the point of the problem, the solution, of the policy.

A corollary point is that strategic planners stress the use of intuition. Business planners started out trying to get business leaders, who often relied on intuitive solutions, to act on more rational grounds. Recent experience indicates that intuition is extremely important. Public planners, too, need to get away from the fear of acting intuitively.

Another key element of

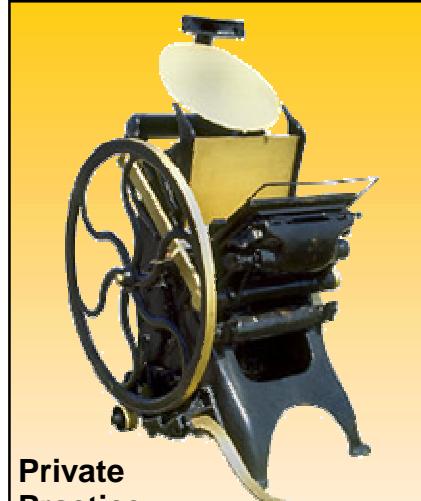
strategic planning is a shift of emphasis away from long-range end states to the decisions that need to be made today. The literature calls this "emphasizing the futurity of present decision." While forecasting plays a role, choosing a specific course of action is seen as even more important...

Private strategic planners pay a great deal of attention to money, and, if public planners are to follow their lead, they will have to do the same. Effectively administered, strategic planning can in fact provide a better framework for public service programming and budgeting.

Strategic planning also can play an important role in involving elected officials. The process demands interaction between technicians and administrators and policy makers. Further, a good strategic plan states its missions and objectives in clearly understandable language.

Strategic planning in government can provide a vehicle for improving managerial effectiveness. Forcing top administrators to concentrate on key strategic issues means that a better sense of mission and purpose can be achieved. Strategic planning can be a mind-stretching exercise for top managers, a way of promoting creativity and innovative thinking and of forcing department heads to ask and answer questions of the highest importance to government.

*Source: Frank S. So. "Strategic Planning: Reinventing the Wheel?" Planning 50 20-21. American Planning Association.*



### Private Practice Perspectives

is published quarterly. We welcome contributions from our readers. Please submit articles and announcements to the editor. The editorial deadlines are:

- Spring Issue—March 15
- Summer Issue—June 15
- Fall Issue—September 15
- Winter Issue—December 15

## Dark & Stormy Planning Prose

The California State Polytechnic University at Pomona is preparing a humorous training video on public hearings. Students are interviewing planners and public officials to gather insight. If you have a story you would like to contribute to **"Hearings from Hell: 101 Ways to Avoid Them,"** please contact the editor, Ric Stephens at [rstephens@aei-casc.com](mailto:rstephens@aei-casc.com). Selected stories will be printed in **P<sup>3</sup>**.



# All-Time Greatest Planning Books

## PLANetizen

*Editorials and Descriptions from Amazon.com*

### The Death and Life of Great American Cities

Jane Jacobs

A classic since its publication in 1961, this book is the definitive statement on American cities: what makes them safe, how they function, and why all too many official attempts at saving them have failed.

### The City in History: Its Origins, Its Transformations, and Its Prospects

Lewis Mumford

An examination of Cities of the Western world tracing their development from Egypt through the Middle Ages to the present.

### The Practice of Local Government Planning

(Municipal Management Series)

Charles Hoch

Learn the development process—from start to finish. [Referred to as the “Green Giant of planning books.” See article page 11]

### Civilizing American Cities: Writings on City Landscapes

Frederick Law Olmsted

Frederick Law Olmsted (1822-1903), designed New York's Central Park, Brooklyn's Prospect Park, Chicago's South Park and

Jackson Park and Montreal's Mount Royal Park. He also designed the parkways and neighborhoods around them, encouraging a new kind of participation in city life. This book collects the plans for New York, San Francisco, Buffalo, Montreal, Chicago, and Boston and the suburban plans for Berkeley, California and Riverside, Illinois, as well as examining the writings that Olmstead made on urban landscape in general.

### The Image of the City

Kevin Lynch

What does the city's form actually mean to the people who live there? What can the city planner do to make the city's image more vivid and memorable to the city dweller? To answer these questions, Mr. Lynch, supported by studies of Los Angeles, Boston, and Jersey City, formulates a new criterion—*imageability*—and shows its potential value as a guide for the building and rebuilding of cities. The wide scope of this study leads to an original and vital method for the evaluation of city form. The architect, the planner, and certainly the city dweller will all want to read this book.

### The American City: What Works and What Doesn't

Alexander Garvin

This comprehensive, multidisciplinary approach to urban planning and design in America

analyzes key projects initiated in 250 U.S. urban areas and details which strategies and programs were successful and which failed.

- New to the Second Edition:
  - New sections on stadiums, entertainment centers, business improvement districts, tax credit housing
  - Checklists and tables for field use
  - A review of recent failures and successes

This classic reference, fully revised for the new millennium, provides proven strategies for professionals and invaluable real-world insights for students.

### Good City Form

Kevin Lynch

With the publication of *The Image of the City* in 1959, Kevin Lynch embarked upon the process of exploring city form. *Good City Form* is both a summation and an extension of his vision, a high point from which he views cities past and possible. First published in hardcover under the title *A Theory of Good City Form*

### The Next American Metropolis: Ecology, Community, and the American Dream

Peter Calthorpe

One of the foremost practitioners of New Urbanism, Peter Calthorpe, an urban designer and architect based in Berkeley, California, offers one of the most

coherent and persuasive arguments for moving the United States away from sprawl and toward more compact, mixed-use, economically diverse, and ecologically sound communities. This book presents 24 of Calthorpe's regional urban plans, in which towns are organized so that residents can be less dependent upon their cars and can walk, bike, or take public transportation between work, school, home, and shopping. This book is not just for architects and urban planners, but for all concerned citizens interested in developing a cohesive, feasible vision of the sustainable city of the future.

## Cities of Tomorrow: An Intellectual History of Urban Planning and Design in the Twentieth Century

Peter Geoffrey Hall

Cities of Tomorrow is a critical history of planning in theory and practice in the twentieth century, as well as of the social and economic problems and opportunities that gave rise to it. Trenchant, perceptive, global in coverage, this book is an unrivalled account of its crucial subject.

The third edition of Cities of Tomorrow is comprehensively revised to take account of abundant new literature published since its original appearance, and to view the 1990s in historical perspective. This is the definitive edition, reviewing the development of the modern

planning movement over the entire span of the twentieth century.

## A Pattern Language: Towns, Buildings, Construction

Christopher Alexander, Sara Ishikawa, and Murray Silverstein

"Brilliant....Here's how to design or redesign any space you're living or working in--from metropolis to room. Consider what you want to happen in the space, and then page through this book. Its radically conservative observations will spark, enhance, organize your best ideas, and a wondrous home, workplace, town will result"—San Francisco Chronicle. A handbook designed for the layman which aims to present a language which people can use to express themselves in their own communities or homes, and to better communicate with each other.

## The Power Broker: Robert Moses and the Fall of New York

Robert A. Caro

The story of Robert Moses, who shaped the politics, the physical structure and even the problems of urban decline in New York.

## Edge City: Life on the



New  
Frontier  
Joel Garreau  
First

there was  
downtown. Then there  
were suburbs. Then there were  
malls. Then Americans launched the  
most sweeping change in 100 years  
in how they live, work, and play. The  
Edge City.



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# Plannerese Dictionary

*Excerpts from the letter "P"*

*By Richard Stephens*

## P

**P.I.** Public information. Planning dispensed “over the counter.”

**PPS - Pre Proposal Syndrome** A condition characterized by nervousness, irritability, emotional instability, depression and possibly headaches; it occurs during the 7 to 10 days before a proposal deadline and disappears a few hours after the deadline. *N. Victor*

**Palace of Puzzles** Capitol. *D. Walters*

**panstereorama** A relief map of a town or country. *H.F. Byrne*

**paper road, paper street** An undeveloped road that exists only on subdivision blueprints or urban planning maps. *K. Drohan* A street that has never been built shown on an approved plan, subdivision plat, tax maps, or official map. *H. Moskowitz*

**The more unworkable the urban plan, the greater the probability of implementation**

**paper trail** CYA documentary. *R. Stephens*

**Papierkrieg** German “paper war”. Red tape dispensed en masse. (Paper airplanes: *Papier-luftwaffe*)

**parapublic planner** A planner working in both the private and public sectors at the same time.

**park, natural** A picturesque parcel of landscaping set aside by cities for use by

muggers, drug dealers, squirrels and habitual sex offenders. *R. Bayan*  
Developer: Exacted area in least developable portion of site  
Environmentalist: Habitat subject to human intrusion  
Fire Department: Fuel depot  
Parks Department: Lost opportunity for another softball field  
Planner: Open Space  
Police Department: Criminal haven/heaven  
Realtor: Marginal Land  
Sociologist: Passive leisure environment  
Common: A place unsafe for children by day and adults by night. *R. Stephens*

**parking lot** Where we spend a quarter of an hour searching for a well-situated space so that we can avoid walking sixty seconds to the mall entrance. *R. Bayan*

**Parkinson's Fifth Law** If there is a way to delay an important decision, the good bureaucracy, public or private, will find it.

**parkway** Area for driving (See “driveway” an area for parking). *R. Atkinson*

**parterre** A building site. *H.F. Byrne*

**pavement deficiency** A pothole. *J. Garreau*

**pedestrian** The variable (and audible) part of the roadway for an automobile. *A. Bierce*

**pedestrian furniture** Park benches. *J. Leach*

**pedestrian pockets** A mixed-use community that stresses walking and

bicycling instead of parking lots and the automobile. *B. Inman*

**penturbia** A “pent-up” area to where people are migrating. *J. Lessinger, J. Stephens*

**periegesis** A description of an area. *H.F. Byrne*

**permaculture** Permanent agriculture—concerned with sustainable agriculture and community living. *B. Mollison*

**persons of longevity** (See “demographics”)

**piñata** A home painted with gaudy colors. *K. Bradfield*

**pioneer buyers** Home buyers who endure mega-commutes for a shot at affordable housing. *B. Inman*

**pipeline** Flow of information usually from advisors to decision-makers. A good planner is similar to “Mr. Plumber” and a poor planner requires “Mr. Plunger.”

**plan** The more unworkable the urban plan, the greater the probability of implementation [Wood's Law]. *R. Wood* (See “assumptions”)

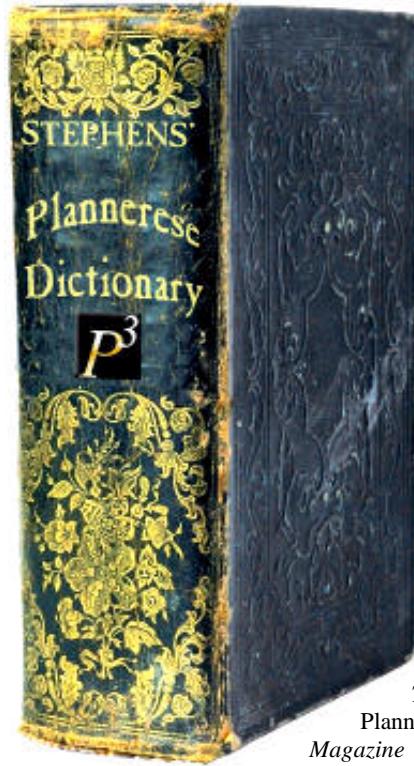
**planarchy** Rule by a plan.

**planecdote** A short planning story.

**planectomy** A surgical procedure to amend a plan to remove controversial policies, standards or requirements. *R. M. Robinson AICP*

**planesthesia** (See “MEGO”)

**planette** Small plan, planning. “Make no planettes.”



**planicide** (See “DBTD/DBTN”)

**plannage** That which is associated with planners and planning.

**planneous** Partaking of the nature of planning, or abounding with or formed by it; plannery.

**planner** 1) A navigator responsible for sailing the ship to the correct port despite hurricanes, calm seas, other ships, lack of steering equipment and instruments, and under the command of numerous captains who may not agree as to the heading, tack or even correct port. A multiple noun (i.e. den of thieves, deck of cards, school of fish, etc.) for planners is a ‘plot’ or ‘place’ of planners. *R. Stephens* 2) Having acquired a little knowledge about a lot of things in school, the planner continues to learn less and less about more and more until eventually the planner knows nothing about everything. This contrasts with the engineer who learns a lot about a very few things and eventually knows everything about nothing—a situation which makes for interesting working relationships between the two disciplines. *Private Planning Perspectives* 3) A Planner is a person who, given 2+2, will arrive at a range somewhere between 3½ and 4½. *J. Freiman* 4) A planner is an individual who collects incomplete information from unreliable sources, then uses it to draw a mathematically precise line from an unwarranted assumption to a politically predeter-mined position. *C. Baker* 5) Developer/Council fodder. *Dear Mary, The Dispatch*

**planner, urban (international)**

ARABIC Mahandes Baladiat

ARMENIAN Kahakashinarar

BRITISH Town Planner

BULGARIAN Gradski planosnimach

CHINESE Tu Sur Si

Chi Su, Zhi din Gui

Hua De Rer

CROATIAN

Urbanista, Gradski

Planer

DANISH Byplan-laegger

DUTCH Stedeboek-kundige, Planoloog

FRENCH Urbaniste

GERMAN Stadtplaner

HUNGARIAN Város Tervezo

ITALIAN Urbanista

JAPANESE Toshi keikaku ka

KOREAN Dosi Sulgesa

MALAYSIAN Perancang

NIGERIAN (Igbo) Odozi Obodo

PERSIAN (Farsi) Shahar Sazy

POLISH Urbanistow

PORTUGUESE Urbanista

RUSSIAN Gradastritel

SANSKRIT Vastu Shastri

SERBIAN Urbanista, Gradska Planer

SOUTH AFRICAN Streekbeplanner

SPANISH Urbanista

TURKISH Sehir

Planlamag\_

**A good place to start from is where you are**

**planner convention**

“He’s got a great idea,...I’m glad I thought of it.” *R. Castillo*

**planner taxonomy**

AUTOMATIC or MANUAL Public or Private

IMPORTED or DOMESTIC Contract or Staff

NEAR-SIGHTED, FAR-SIGHTED, or BLIND Current, Advanced, or Administrative

PLANNERISTE or PLANOLOGIST Artistic or Analytic

**planna wannabe** Pseudo-planner.

[From “I want to be a planner.”]

**plannerese** 1) The language of plannage, in a planner of speaking. *R. Stephens* 2) Planner patois. *Los Angeles Times Magazine* 3) Planner-speak. *Times Magazine*

**plannerism** A personal and prominent peculiarity of style in planning.

**planning** 1) The ancient arts of fortunetelling, finger-painting and alchemy folded no larger than 8½ x 11 inches. 2) Planning truly is in the eyes of the beholder! Planning to the council person is bending the rules to stay on the Council. To the commissioner it is bending the rules to see if they can get onto the Council. Planning is a “poor cousin” to the architect. Planning is “Rosemary’s baby” to the engineer. Planning is the “light at the end of the tunnel” for planners. This explains why

many plan-ners have “tunnel vision”! *Dear Mary* in “The Dispatch” 3) Land Use ---, Interior decorators gone wild. *R. Castillo* 4) A boutique service (as perceived by some engineering firms). *S. McCutchan AICP* 5) A good place to start from is where you are [Wolf’s Planning Law]. *C. Wolf, Jr.* 6) The longer ahead you plan a special event, and the more special it is, the more likely it is to go wrong [The (F)law of Long-Range Planning]. *D. Evelyn*



# Reinventing Planning

*ABZs of Planning Management*  
By Paul C. Zucker

**D**avid Osborne and Ted Gaebler's breakthrough book on Reinventing Government is a must-read book for all planners. In this chapter I show how some of their principles can be applied to Planning Departments.

## Mission-Driven Planning

A reinvented planning department must run more by mission than by rules. The mission must be clear on what you want to achieve and let staff use their ingenuity to achieve it. Rules can prevent bad things from happening, but at the same time can inhibit good, new creative things from happening. As you become more creative, you will make some mistakes. If you are not making some mistakes, you may be too rule-driven.

## The application of knowledge, skills, tools, and techniques to project activities to meet project requirements

Historically, government does not tolerate mistakes. One mistake leads to a new set of rules. Planning directors must take the lead in defending the department's mistakes. You might even have some fun and celebrate your mistakes.

As you move from rules to mission, a number of important things will start to happen.

- ◆ Employee morale will improve
- ◆ New innovative ideas will

- ◆ emerge.
- ◆ Efficiency and effectiveness will increase.
- ◆ You become more pro-active to changing circumstances and thus more politically astute.

Some may want me to write their mission statements, but this won't work. You need to pound these through together. Let each division work on its own thoughts and compare notes.

- ◆ In your development activities, can you think of yourself as a service provider rather than a regulatory agency?
- ◆ Is part of your job to help the customer find a solution to regulatory problems?
- ◆ Are you really planning or merely collating regulatory requirements from other departments?

- ◆ In long-range planning, are you in partnership with other departments and developers or planning for them?
- ◆ Are you concerned about citizen participation in government or alienation from government?

## Measuring Things

Many of the examples in reinventing government come from

Sunnyvale California. I recently had the opportunity to interview the Director of Community Development. I asked him how Sunnyvale operates. The first thing he said was, "We measure things. We have performance standards for the functions."

Developing good measuring systems is not easy and requires considerable trial and error. What should you measure and how should you measure it? Standard measurement systems focus on the four aspects of quantity, quality, cost and time.

Quantity, cost and time are often the easiest to measure. Many of the same principles can be applied to long-range planning. On this topic, I can make an adamant statement. If your employees are not yet on a time card system, you cannot measure these activities.

Quality, cost and time measurements often measure efficiency. Far more important and more difficult is the measurement of quality or effectiveness, or what Osborne and Geabler call "funding outcomes, not inputs."

Setting outcome measures for planning activities can be extremely complex. Furthermore, it's not hard to imagine that, if we had real measures of outcomes, we might conclude that much of our planning is ineffective...

Once you begin to measure things, you'll be amazed at the results. The very act of measurement not only creates positive impacts on those being measured, but also



unleashes whole new approaches to your activities. It may take you several years and a lot of trial and error to develop a good system of measurement, but the time to start is now.

## Customer-Driven Planning

No single topic will likely change your organization faster than creating a customer-oriented program.

You first need to define the clients or customers. Most planning departments have multiple clients and each client group may have different needs. You will have to find different techniques to reach each client and implement different strategies to serve them.

Virtually all gains being made in private businesses today start with a fundamental focus on the customer. The customer, and being aware of his or her needs, is the backbone of the popular Total Quality Management movement, TQM.

## Decentralized Planning

Private businesses are achieving major productivity gains through decentralization and the

creation of smaller units. They are also moving from rigid hierarchies to more employee participation and team work. Over the past few years

I've had the opportunity to study both large and small planning departments. As a general rule, I've found that smaller departments are more efficient and have better employee morale than do the larger departments.

Osborne and Baebler contended that decentralized institutions are:

- ◆ more flexible
- ◆ more effective
- ◆ more innovative
- ◆ have higher morale
- ◆ have more employee

commitment, and

- ◆ have greater productivity.

Make certain your mission is clear before you decentralize and empower your employees. Then, once it's clear, try a few of these ideas.

## Decision Levels

Make a list of all the decisions currently being made in your organization. Can you reduce the number of layers in this department involved with each decision? Have each manager or supervisor select one decision they are now making. Over the next 30 days train a subordinate in this topic and delegate the decision. Repeat this process as

## Every planning project has a customer and end-user base

many times as you are comfortable.

## Teams

Develop cross-functionally teams for your next project. Select team members from both short-range and long-range planning.

## Holistic

Move away from functional organizational units to holistic units whenever possible.

*(Continued on page 10)*



(Continued from page 9)

### **Project Managers**

For development projects, train the project managers well and let them run with the project. Don't try to continually second-guess them.

### **Mid-Level Managers**

Next time you have a management vacancy, re-examine your organization. See if you can eliminate this management position. Trade in the position for more operating planners or a new computer.

### **Training**

Decentralized planning will require spending more time on training employees. Added training can more than pay for itself in improved productivity and effectiveness.

## **Reinventing planning requires us to reinvent anticipatory planning**

### **Functions**

Look at your functions. Could some of these be better performed by other departments?

### **Anticipatory Planning**

Effective organizations are preventing problems from occurring rather than spending all their time on problem solving and crises. As government budgets have been reduced, I've seen government in a vicious cycle of crises solving. In

recent years, it's been very popular to build more jails and add more police. Yet government programs aimed at treating the root cause of crime go unfunded.

Planning was founded on the need to look ahead and avoid future problems; but how have we actually performed? Most planning departments haven't even been able to project the level of development activity in order to handle staffing levels and expenditures' revenues, let alone dealing with more global issues. As planners, have we devised plans where transportation and land use are in balance, or housing and jobs? Have we anticipated community unrest or problems of the aging population?

We need to re-look at our planning effort and move away from static plans toward dynamic plans that anticipate change. Granted,

change is coming so fast that our task is increasingly difficult. Nonetheless, it's the challenge of the planning profession.

As a strategy exercise, make a list of all the crises you handled over the last two years. Brainstorm with your staff what could have been done to anticipate the crises and keep them from occurring. Use this experience to brainstorm what new crises you can expect over the next few years and then develop a plan to avoid the crises...

Reinventing planning requires us to reinvent anticipatory planning.

### **Enterprising Planning**

Government is increasingly finding ways to earn money rather than simply to spend it. In some cases, this means actually creating a profit, in others it means balancing the budget without using traditional tax revenues.

Profit approaches include receiving a percentage of revenue in redevelopment projects of leasing public land. Some creative departments have sold or leased their software.

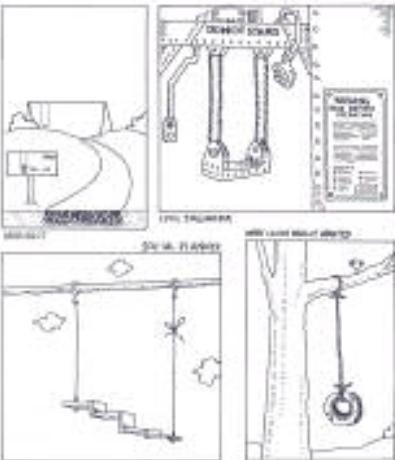
Planning departments should examine all of their functions from an enterprise perspective.

### **The ABZs of Planning Management**

Paul C. Zucker.  
West Coast Publishers  
San Diego, California 1997

### **Change of Address?**

Update your own APA record. Go to <http://www.planning.org/membersonly/memberdirectory.htm>, log in with their APA membership number (6-digit number in the top left corner of your Planning magazine mailing label). Please check your e-mail address and add it if that field is blank. More and more of APA's communications are being delivered via e-mail, so it's important your e-mail information is correct.



# Who is the client?

*From The Practice of Local Government Planning  
By the International City Management Association*

*Published in cooperation with the American Planning Association*

**T**he quick answer to the question of who is the client is that the planner's client is whoever pays the planner's salary. The professional does owe diligent service to the client employer. Ethical performance requires that a planner not serve at the same time two employers who may have conflicting interests.

One peculiarity in identifying the planner's client is that the planner may often have one employer with conflicting interests. For example, in one city a planner may be recruited, interviewed, and recommended for appointment by a committee of a planning commission. The planner is appointed by the mayor or city manager and then confirmed by the city council. Subsequently, this planner reports, let us say, to the city manager providing studies and advice on many aspects of the manager's business. The planner also advises the planning commission on its decisions and the city council on its legislation.

Where their interests or views differ, whose does the planner serve among these multiple bosses? One refuge is in the standards of the profession. The same thorough and dispassionate analysis will be presented to all participants; the same careful analysis of alternative possible decisions will be made for all. Hazards, opportunities, and possible compromises in resolving issues are conscientiously disclosed.

This model of the conscientious professional answers

the problem only partially. The decision makers want more than the facts and analysis. They want a recommendation. If the statement made earlier about the impossibility of being completely neutral as a planner is true, then even the analysis alone contains a gentle steering toward a particular recommendation. Make it explicit, the decision maker asks, and give your justifications.

Planners serve the public interest primarily (say ethical codes) and must fit the client-employer's interest to the public interest or else not serve that client. This guide is needed most when the public interest is hardest to identify. It is needed most, then, when its guidance is least clear.

The public interest is an amalgam of many specific interests. These include serving the interests of democratic majorities; improving the conditions of the

weak, poor, or handicapped; protecting resources in the long run; economizing in the use of public funds; living up to our laws; protecting health and safety; preserving human rights—in short, doing all the things that pursue our abiding values. Even the ability to pursue private interests is part of the public interest, in light of our high value of government as servant of the individual.

We cannot codify a consensus on a permanent balance among these competing parts of the public interest, nor a permanent

balance between the public interest and the right to pursue private interests. A planner, then, has the professional responsibility of achieving such a balance personally and using it as a personal guide.

Some planners have found a durable imbalance in the public interest, especially as public decision affect the poor and minority groups. Some have become advocate planners, advocating the special interests of those groups that do not normally command articulate, knowledgeable, skillful, and aggressive representation. Advocate planners have cited precedents for the advocacy of a special interest by pointing to planners who have "advocated" for builders and developers, for example, or for transportation interests.

In a common phrase, planners are sensitive to the needs of

**Even the ability to pursue private interests is part of the public interest**

a client, to the needs of an elected official, or to the needs of a special interest as advocate planners or special purpose planners. The common allegiance that unites planners is a sensitivity also to the needs of publics beyond the immediate client. As a planner in the job of finding a balanced public interest to serve, you are your own client.

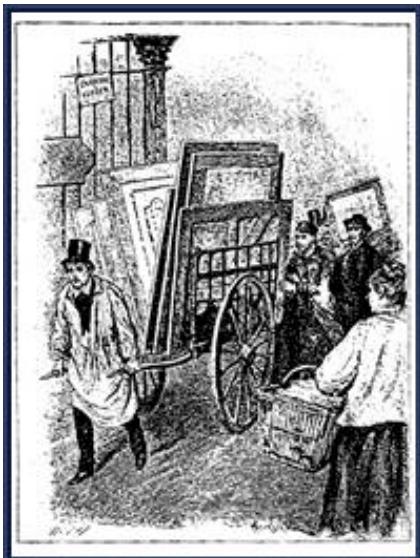


# Charrettes

National Charrette Institute  
[www.charretteinstitute.org](http://www.charretteinstitute.org)

## What is a Charrette?

The French word, “Charrette” means “cart” and is often used to describe the final,



## The French word, “Charrette” means “cart”

intense work effort expended by art and architecture students to meet a project deadline. This use of the term is said to originate from the École des Beaux Arts in Paris during the 19th century, where proctors circulated a cart, or “charrette”, to collect final drawings while students frantically put finishing touches on their work.

## What is the difference between a visioning

## workshop and a Charrette?

Charrettes are often confused with visioning workshops. The purpose of vision development is to establish a description of a future state based on shared community values that acts as a guide for the project decision-making process. The visioning process can include one or a number of efforts including educational lectures, workshops, neighborhood walks, and preference surveys. According to practitioner Gianni Longo, visioning sessions are citizen driven and comprehensive, they take into account the "long horizon," and they work best for master plans. They produce goals, principles, policies, and initiatives.

A visioning session, or series of sessions, gets a community ready for a Charrette. Most of the time, visioning sessions are held well in advance of

the Charrette but sometimes a Charrette begins with one, depending on the individual community's needs.

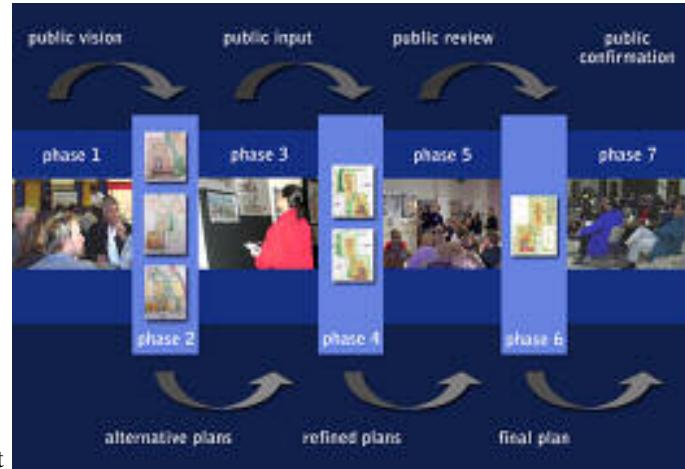
Visioning sessions are very valuable during the process of Charrette preparation. Holding a visioning workshop is a great way for a community to come to an agreement on its basic values and the vision of those values as implemented. Having a set of shared values, principles, and vision statements is important to accomplish before the Charrette begins.

## What actually happens at a Charrette?

It is important to note that a successful Charrette cannot be a stand-alone process. It is one phase of the Dynamic Planning process, which requires extensive preparation and follow-through for plan approval and implementation.

The workflow of the NCI Charrette involves a series of collaborative design and public input cycles for multiple, consecutive days. Everyone – from key decision-maker to citizen – becomes aware of the complexities of development and design issues, and everyone works together to arrive at the best possible solution.

A central element of the charrette is the “design team,” a multidisciplinary group of professionals that provide the necessary expertise to create a feasible plan that considers all relevant input. This team is the constant of the Charrette, working day and night on site in the Charrette Studio to develop a holistic feasible plan. This doesn't mean that the entire community must take a week off from work to hold a charrette. The charrette stakeholders, anyone who is impacted by the project or has interest, are involved at a minimum in scheduled meetings, including at least two public meetings. Stakeholders are also welcome to visit the Charrette Studio throughout the Charrette during open hours. In this way, it does not consume large



blocks of time for residents or officials.

Once the design team completes its set-up procedures, including a team kick-off meeting and site tour, a public hands-on workshop is conducted for the purposes of creating a clear understanding on the part of all participants about the purpose and process of the charrette and to solicit the public's project vision. The next day the design team creates a series of alternative plans based on all information gathered to date, including the public vision, and then solicits input at another public meeting. This input is used to refine the alternatives and create more detailed plans that are again reviewed and critiqued by the public during an open house. The design team further refines and narrows the feedback into a final plan and set of implementation documents to be presented for public confirmation on the final night of the Charrette.

It is important to note that the project is not complete when the charrette is. Document refinement and further feedback occur through stakeholder discussions and a follow-up meeting approximately a month after the charrette. This allows everyone to check in on the refined charrette plan and to allow for one final feedback loop.

## Charrette Scheduling Rules of Thumb

Proper Charrette scheduling

is a very important component of the

Charrette planning process. For example, the more complicated a project, the longer the Charrette needs to be. Therefore, Charrettes that last less than seven days should only be used for simple, low-controversy projects. NCI has developed the following list of basic rules of thumb for Charrette scheduling:

- Open and close the Charrette with major public meetings: This will help to make the process transparent and will also allow for the public meeting attendees to have multiple chances to voice their opinions.
- Schedule at least three feedback loops at major decision making points: Feedback loops that involve all participants are the most important element of the Charrette process. Three loops is the minimum needed to enable transformative community change.
- Allow ideally two days, and a minimum of 24 hours, between feedback loops: 24 hours is the minimum amount of time necessary to execute the revisions of the plans based on the feedback.
- Meet with all key stakeholders by the end of the second day or

**Meet with all key stakeholders by the end of the second day or...**



### The National Charrette Institute

[www.charretteinstitute.org](http://www.charretteinstitute.org)  
The National Charrette Institute is a nonprofit educational institution that helps communities achieve healthy transformation through collaborative planning processes that harnesses the talents and energies of all interested parties to create and support a buildable plan.



# Private Practice Planning Division Bylaws

## 1.0 General

### 1.1 Name

The name is the Private Practice Division of the American Planning Association

### 1.2 Objectives

The area of interest and purpose of the Division is to meet the career and functional needs of individual private practice planners. This includes but is not necessarily limited to: addressing standards for private practice professionals; providing an information exchange; examining issues related to consultant selection, contracts, etc.; contributing to the education of future private practice professionals examining issues related to organizational change, acquisitions, mergers, marketing, merchandising, ethics, contract and other consultant matters; and other issues which contribute knowledge to and promote cooperation among private sector planners and the larger planning community.

### 1.3 Procedures

Parliamentary procedures shall be governed by Robert's Rules of Order.

## 2.0 Membership

### 2.1 Eligibility

Any interested member of APA may join the Division upon payment of the Division's dues. Non-APA members may become Division affiliates upon payment of the Division dues, plus whatever additional service fee the Division and/or National APA shall determine is appropriate.

### 2.2 Termination

Membership will be terminated upon failure to pay Division or APA dues or the affiliate fee.

## 3.0 Officers

### 3.1 Elections

The elected officers are: Chairperson, Vice-Chairperson and Secretary-

Treasurer. All officers shall be elected. The terms of office shall be two years. Elections will be held every other winter, with new officers taking office at the Spring APA conference. No officer shall hold the same office for more than two consecutive terms. All officers shall be certified planners and members in good standing of the American Institute of Certified Planners (AICP).

### 3.2 Chairperson

The Chairperson shall: preside at all Division meetings; prepare an annual program and budget for approval by the Executive Committee; develop a long-range plan; appoint committees and a Newsletter Editor; assess the needs of the Division; maintain contacts with related organizations; serve on the Division Council; and be responsible for complying with requirements of the APA Corporate Bylaws.

### 3.3 Vice Chairperson

The Vice Chairperson assists the Chairperson and coordinates committee activities. In the event of the absence or resignation of the Chairperson, the Vice Chairperson shall become acting Chairperson and carry out all the functions and responsibilities of the Chairperson.

### 3.4 Secretary – Treasurer

The Secretary-Treasurer shall: in conjunction with the National APA office, maintain a list of Division members; prepare minutes of Executive Committee and other Division's business meetings; submit proposed Bylaws and amendments to the membership and National APA; receive and disburse Division funds; in conjunction with the National APA, maintain financial records which can be audited; assist the Chairperson in preparing an annual budget; prepare an annual financial report for the Division's members and the National APA office and quarterly reports for the national office; assure that all required filings are sent to the APA staff; and, in the event of

the absence or resignation of both the Chairperson and ViceChairperson, become and function as acting Chairperson and carry out all the functions and responsibilities of the Chairperson.

### 3.5 Successions

A Vice Chairperson succeeds the Chairperson in case of vacancies. If vacancies occur, all other positions are filled by the Executive Committee.

### 3.6 Nominations

A Nominating Committee, consisting of three or more Division members, shall be appointed by the Chairperson. The Chairperson does not serve on the Nominating Committee. At least one person shall be nominated for each office. Additional candidates may be nominated by petition signed by at least 20 members of the Division. Members of the Nominating Committee shall not be eligible for office. Elections shall be conducted by the Nominating Committee on the following schedule in every even-numbered year. Nomination and membership notification by the Fall of the odd number year ballots, including petition candidates mailed by January 31; ballots received by Nominating Committee by February 28 and tallied by March 1. All voting shall be by mail ballot. Election results are based on plurality of the valid ballots received

## 4.0 Executive Committee

### 4.1 Composition

The Executive Committee shall consist of: Chairperson, Vice Chairperson, Secretary-Treasurer, immediate Past Chairperson, Newsletter Editor, and any other Division officials as determined by the Executive Committee.

### 4.2 Duties

The Executive Committee shall manage the affairs of the Division; adopt annual program and budgets; authorize expenditures consistent with the budget; consult,



by telephone or in person, every other month to coordinate the activities of the Division and the established committees.

## 5.0 Committees

### 5.1 Standing Committees

The standing committees of the Division shall be: Credentials/Criteria Committee, Session Committee, and Newsletter Committee.

### 5.2 Other Committees

Other Committees shall be appointed by the Chairperson as the Bylaws require and at the Chairperson's discretion.

## 6.0 Meetings

### 6.1 Annual Meeting of Members

The annual meeting of members of the Division shall be held in conjunction with the APA National Planning Conference generally held in late spring of each year.

### 6.2 Special Meetings of Members

Special meetings of members may be held at such times and places as may be ordered by: the Chairperson; or in the case of the Chairperson's absence, death or disability, the Vice Chairperson; or a majority of the Executive Committee; or by petition of 20 percent of the members.

### 6.3 Notice of Meetings

Except as otherwise provided in this section, notice of meetings shall be given through the Division Newsletter, provided distribution of the Newsletter is not less than 30 days prior to such meeting. Notice of each meeting may be given by personal delivery or by letter or telegram not less than 7 days and no more than 60 days before the date of the meeting.

### 6.4 Quorum

Five percent of the members shall constitute a quorum for the transaction of business at all meetings.

### 6.5 Actions

Any action, with exception of dues changes, may be taken at a meeting of the members at which a quorum is present by

affirmative vote of a majority of members present at such meeting.

## 7.0 Finances

### 7.1 Dues

Dues are \$25 per year. Division affiliates shall pay a separate additional service fee of \$10, with APA Board approval, over and above the regular member service fee. Student membership in the Division, with proper verification, is \$5 per year. Dues are collected by National APA and shall be related to the Division quarterly, unless the Division is on probationary status by the National APA for processing fees.

### 7.2 Dues Changes

Dues changes shall be suggested by the Executive Committee. Proposed dues changes shall be notified to the membership through publication in the Division Newsletter. Dues changes must be approved by mail ballot based on a plurality of the valid ballots received.

### 7.3 Service Charges

The Division shall pay the fee that the APA Board may, from time to time, assess each Division for national office services.

### 7.4 Non-Dues Receipts

Subject to the approval of the Executive Committee and the National APA, the Division may accept contributions, donations and grants. The Executive Committee may establish fees for publications and services to be offered nonmembers or special services to members.

### 7.5 Contracts

The Division may not enter into agreements or contracts with organizations outside of APA without knowledge and prior review by National APA.

### 7.6 Sponsorship / Co – sponsorship

The Division may sponsor or co-sponsor publications, sessions or services with other organizations and groups. The Ex-

ecutive Committee may undertake these sponsorships or co-sponsorships on its own behalf and not on behalf of the APA as long as these sponsorships/co-sponsorships are with the knowledge and prior review by National APA.

## 8.0 Publications

### 8.1 Newsletter

A newsletter or comparable publication shall be distributed quarterly to members of the Division.

### 8.2 Identification

Division publications shall be identified with their full name as "a Division of the American Planning Association" and within the uniform logotype of the Association.

### 8.3 Filing with National APA

At least ten (10) copies of each publication or report shall be filed with the National APA.

## 9.0 Policy

No member shall represent the Division or APA on matters of policy without first obtaining the approval of the Executive Committee and the National APA.

## 10.0 Amendments/ Bylaws

Bylaws may be adopted or amended by plurality of valid ballots received. Mail ballots shall be used. The Secretary-Treasurer submits to the membership all proposed amendments, as recommended by the Executive Committee, or by a petition signed by at least ten (10) Division members. A copy of proposed bylaws, or amendments, shall be filed with the National APA for review, before publication or adoption. Adopted bylaws shall also be filed.



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**Dark & Stormy Planning Prose [see page 3]**

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**APA**  
**Private Practice Division**  
**Membership Department**  
**122 S Michigan Ave, Ste 1600**  
**Chicago IL 60603-6107**

I wish to join the APA Private Practice Division

APA Status:

- Member \$25
- APA Student \$10
- Non-member \$45

Name \_\_\_\_\_

Title \_\_\_\_\_

Organization \_\_\_\_\_

E-mail \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone \_\_\_\_\_

Fax \_\_\_\_\_