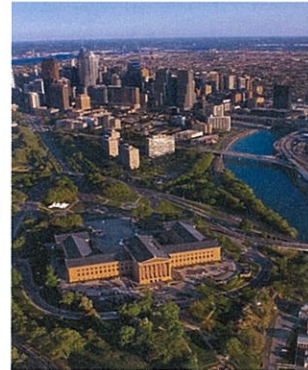


# Philadelphia Citizens Planning Institute: Building Capacity for Local Planning

**Donna Carney, Director- Citizens  
Planning Institute (CPI), Philadelphia  
City Planning Commission**

**Lynn Mandarano, PhD, Temple  
University- national survey of citizen  
planning academies**

**Discussion on Public Outreach**



Citizens Planning Institute

*[Notes are approximate narrative by Donna Carney, CPI Director for the 40 minutes of this session.]*

**October 20, 2013; session at 2:30pm  
PA APA Conference- Harrisburg**

I'm going to start this session with an outline of how Philadelphia's Planning Commission has formalized its educational and outreach role by creating the CPI- what the impetus for this was and how this 3-year old institute is structured.

Lynn will talk about the results of her national survey of 5 citizen planning academies, of which Phila CPI was one (with the highest response rate!)

We'll close with a conversation about your public outreach strategies, and what you're interested in.

[Review handouts- CPI application, Fall 2013 course summaries, Fall flyer]



PHILADELPHIA  
2035  
comprehensive  
PLAN



by Donna J. Carney, AIA, LEED AP  
Director, Philadelphia Citizens Planning Institute,  
Philadelphia City Planning Commission

## The Philadelphia Citizens Planning Institute & Integrated Planning & Zoning Process

The Philadelphia City Planning Commission and Zoning Code Commission are currently engaged in two large initiatives—reforming the city's outdated zoning code (*first authored in 1933*) and the preparation of Philadelphia2035, the City's comprehensive plan (*last updated in 1962*).

tute was launched in May, 2010. A series of three weekly "Citizen Planner" classes has just concluded. This pilot course was designed to test the development of classroom materials for '101' level introductions to planning

was worth my time and effort and then some. I believe this program has the potential to recreate our communities." (participant comment on final course evaluation)  
"This spring, the CPI "core"

March 2011- article in The Vantage Point- PA APA newsletter/magazine  
At that time, we had just completed the "pilot" program, funded by WPF and had secured additional grant to do a Spring 2011 expanded program



Two years later, last April, the Philadelphia City Planning Commission won a National Planning award for Best Practice for the Integrated Planning & Zoning Process in Chicago.

The three components of this integrated process are the Phila2035 comprehensive plan, zoning reform, and the CPI.

## Part II: The Integrated Planning and Zoning Process



Graphic depiction of a clunky process name---

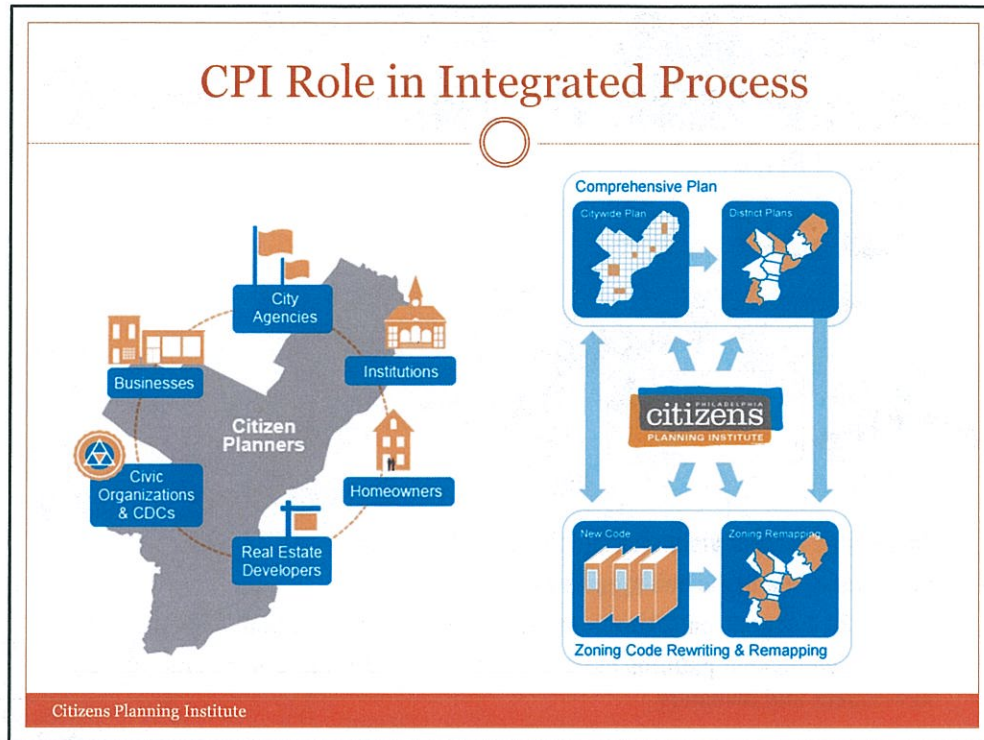
1. Zoning reform- started with voter referendum in 2007- turned into a 5 year process- with over 3,000 participants in an extensive public feedback process, with a new Zoning Code Commission to oversee the process.

The citywide Vision (comprehensive plan) or "Phila2035" got underway in 2009—and was adopted in June 2011.

Significant to note that the last comprehensive plan was completed in 1962 and the zoning code hadn't been comprehensively revised in over 50 years- mess of amendments.

I came on board as a consultant in 2010 to figure out what the CPI should be---with the intention to educate and engage the citizenry about these 2 big initiatives and the subsequent work resulting from them....

*Mission statement- empower interested and active citizens to be more effective advocates for planning in their neighborhoods and the city as a whole.*



CPI is a key component in the city’s Integrated Planning and Zoning Process- strategically linking citywide comprehensive planning- 2035 vision, district planning, and zoning reform efforts taking place over the next several years.

The CPI offers a series of classes twice a year- in the spring and fall—open to any Philadelphia resident, but using an application process to select 30 participants for each series of 6 classes. (I’ll talk more about that structure in a bit)

## Phase I: *The Citywide Vision*

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2035

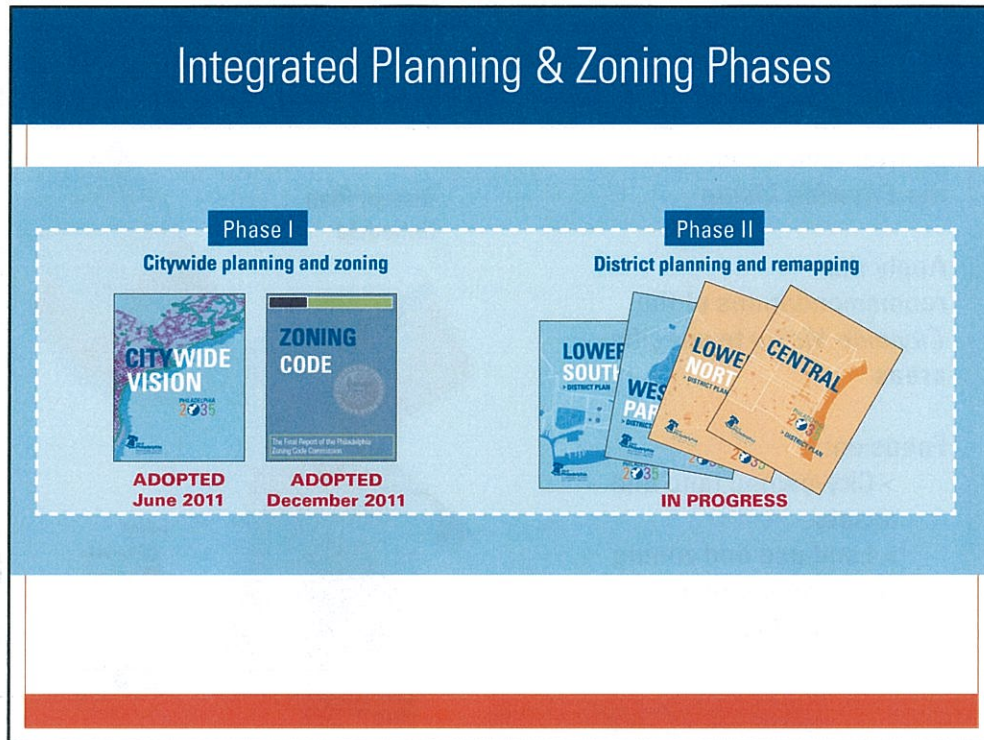


- > Establish a 25 year vision for the City of Philadelphia
- > Broad citywide goals and recommendations
- > Guide City budgets, collaborations, and investments in the built environment
- > Make development patterns more predictable for citizens, community groups, developers and investors

Copies up front are the Executive Summary of the comprehensive plan, with these broad goals...

Complete copy available online at [phila2035.org](http://phila2035.org)

# Integrated Planning & Zoning Phases



Adoption of the citywide vision was part of PHASE I, as was adoption of the new zoning code-  
Which went into effect in August 2012.

Phase II, the phase we're in now, means doing 2 of the 18 DISTRICT plans per year. 6 are now completed and 2 underway....

## Phase II: District Plans

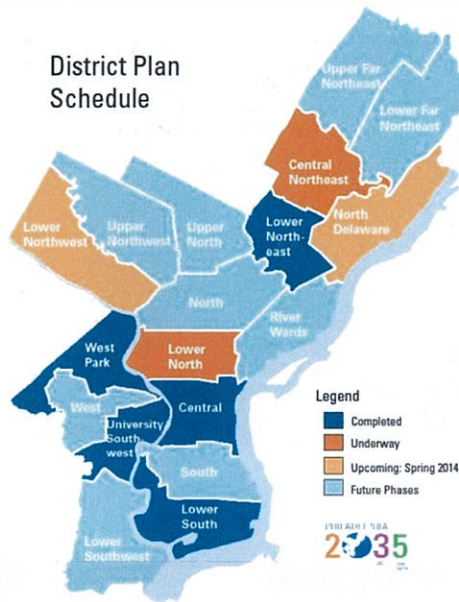
Shorter time frame than the *Citywide Vision*

Apply the recommendations of the *Citywide Vision* to specific areas

Focus on:

- > City-owned land and assets
- > Land use and zoning recommendations
- > Focus Areas

District Plan Schedule



Why is this significant for CPI?

In selecting the 30 participants for each cohort, we try to select applicants from districts undergoing district plans now or will be next up for district plans. Graduates are key ambassadors in getting the word out about public meetings for these plans and we have also drawn upon grads to help the PCPC facilitate these meetings.

Because after going through the course, they “get” why planning is important and become influencers in their community.

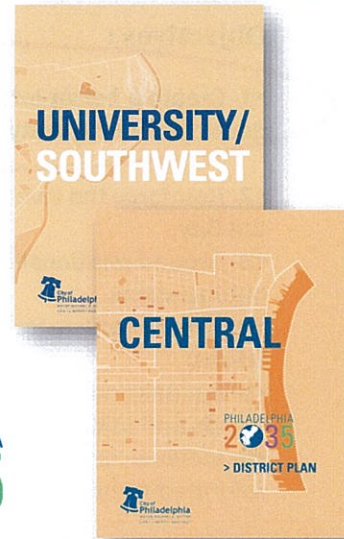


## Phase II: District Plans

### District Plans do 3 BIG THINGS:

1. Translate citywide vision objectives at a local level
2. Propose zoning changes based on land use surveys
3. Create Focus areas- to frame high impact positive changes.

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2035



Key part of implementation is addressing zoning- a big part of district plan recommendations.

CPI grads become advocates for 2 types of zoning changes- “corrective” zoning – reflect actual land use and ZAP—“zoning to advance the plan.”

In Phila—it’s all about relationships with City Councilperson in that district to sponsor these zoning bills.

Another amazing thing happening during each district plan is parcel-by-parcel survey to inventory actual land use- something that has never been done before to this extent.

## Formation of the CPI...

### Objectives :

- 1- Create a better-informed citizenry; increased planning and development capacity at the community level.
- 2- Reinforce the role of PCPC as the leader of planning activities for the City;
- 3- Expand relationship between PCPC and community residents and organizations
- 4- Create vehicle for community input on planning & development issues;
- 5- Increase capacity of PCPC to educate citizens on current planning trends and initiatives; and
- 6- Increase citizen and the City Council's support for passage of the reformed zoning code.

Citizens Planning Institute

CPI "Pilot" was launched in the fall of 2010.

As this pilot was funded by a grant from the William Penn Foundation- there were specific objectives and outcomes delineated as metrics for successful completion.

An objective not foreseen but an emerging strength of the program, is the network being created across the city [between CPI grads- meeting people from neighborhoods they'd never heard of], as well as putting a "face" on municipal agencies—helping to eliminate the "us" and "them" perception that reinforces a "reactive" stance.

My favorite quote from a participant: *"my sense of community has been expanded to include the entire city"*

## Citizen Planning Education Models

- **PMPEI- PA. Municipal Planning Education Institute**

- More than 10,000 Pennsylvanians serve on 1,700 municipal and county planning commissions.

- 6,000-7,000 serve on zoning hearing boards or are involved with 1,600 municipal zoning ordinances.



Citizens Planning Institute

- **Citizen Planning Academies**

- Sacramento, CA
- Lakewood, CO
- Atlanta, GA.
- Bellingham, WA.
- Bedford County, VA.
- Hanover County, VA.
- San Rafael, CA.
- Chatham County-Savannah, GA.
- Edmonton, Canada

CPI built on research on different model of citizen planning academies, and the strongest model had “core course” and electives- Sacramento- had course material online and had been operating for 8 years before budget shortages ended their program.

Series of classes commonly had limits of 30 people, most had an application process, and some kind of recognition for the time invested.

**PMPEI-** Stan Lembeck- 1992 training appointees to planning commissions and zoning boards; train the trainer

Borrowed heavily from that model:

Adult education- session, unit, interactive, small group exercises, Q&A, incorporating feedback and questions on the evaluation sheets

Unlike this institute—the CPI is NOT training people—because diversity of experience and application- it’s general information, not a set of specific skills...

## Collaborators

How did you decide who would contribute and how?



Citizens Planning Institute

So where to start? I'm an architect not a planner (a benefit- since I was a learner too!), and was unfamiliar with city government...

Planning commission staff helped me formulate a spreadsheet of over 100 names: people who could help with content, instruction, outreach- from municipal, civic orgs, non-profits, private companies, educational and foundations, private development/real estate

Those who are knowledgeable aren't necessarily good instructors!

Also interviewed leaders in different civic groups to learn more about the needs, gaps in information, or misinformation; 5 of these "informants" participated in the pilot course.



To date, we've recruited 56 volunteer instructors and panelists- from public private sectors—most “core class” instructors returning each session.

In the Fall session, we have 10 NEW instructors -including CPI grads on a panel to talk about best practices for zoning committees.

## Requirements & Course Structure

- **Core Course Sessions**  
(required)

- 1-Planning in the City- the Big Picture
- 2-Land Use & Zoning 101
- 3-The Development Process – Nuts & Bolts

- Workshop- half-day at PCPC  
(optional)

- **Elective Sessions**  
(2 of 3 required)

- Commercial Corridor Development
- TOD's & the Role of Public Transit
- Healthy Communities & Environmental Justice
- Preserving a Sense of Place in Neighborhoods
- Greening Philadelphia
- Strengthening Your Organization
- Zoning Committee Best Practices
- Vacant Land & Community Access

Citizens Planning Institute Nov 2010

**After the fall 2010 pilot, the course sessions were expanded with a series of “electives” - new set of 3 each semester**

The pilot course is now called the “**core course**” series and attendance at all 3 sessions is required before taking “**electives**”.

We will also offer an optional half-day Saturday workshop at the Planning Commission.

Completion of **2** of the **3 NEW** **electives** will earn participants “**Citizen Planner Certificate of Completion**” careful to say it’s NOT “certification” ...planner sensitivity. The list on the right is a sample of some of the **electives** offered in each series.

**Class Structure**  
2 Units  
Group Exercise

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**Citizens Planning Institute Fall 2013 Course Syllabus**

**Session 1:** Core Course: The BIG Picture- Planning in the City  
Unit One: What is Planning?  
Unit Two: The Work of the Planning Commission

**Date:** Wednesday, October 9, 6:00-9:00pm

**Faculty:** Unit One: Paul Vernon, Managing Principal, KSK Architects, Planners, Historians Inc.  
Joyce Smith, Citizen Planner (2010) & Viola Street Residents Association (VSRA)

Unit Two: Andrew Meloney, City Planner, Philadelphia City Planning Commission

**AGENDA:**

6:00pm	Buffet Dinner / Distribution of Session Materials
6:10pm	Welcome & Introductions
6:25pm	Unit One: Paul Vernon with CPI grad Joyce Smith- The BIG Picture (group exercise)
7:30pm	Break
7:40pm	Unit Two: Andy Meloney- The Work of the Planning Commission
8:20pm	Small Group Exercise: Action Plan for a Neighborhood Project
8:40pm	Table Reports- Action Plans
8:50pm	Evaluation form

Describe structure- 2 units, learning objectives, exercises, **evaluation**

Each class runs from 6:00-9:00pm. Begins with a buffet dinner, as most people are coming straight from work.

They receive a packet of handouts for each class, including a syllabus/agenda and ppt printouts.

The evening is divided into 2 “units” with separate instructors. There is usually a group exercise where people work in table teams, then present back to the class. This interactive activity reinforces the content and is an opportunity for participants to learn from each other.

Important that we end on time, and with enough time for them to complete a page long evaluation form, which helps us refine and improve program content.

Session 3: Development

Putting on developer hat:

- What are the constraints?
- Goals of neighborhood?
- Appropriate scale of project?

Citizens Planning Institute

The small groups exercise is usually a mapping exercise or table discussions and reporting back.

In the exercise at the top, participants decide whether they are non-profit or for-profit developers and what kind of project they will promote in the neighborhood they grew up in (all work on the same one) to meet stated neighborhood goals. This class on the development process is designed to generate a little developer empathy...





More class group work...try to make it fun and interesting...



Feedback from one cohort results in adding an additional requirement to receive the “Certificate”---

All are now required to complete a “course project”, which is any planning related assignment that is of interest and useful to them and their organization.

A “S.M.A.R.T.” (specific, measurable, achievable, relevant, timed) action plan template is handed out as one way to meet the requirement. Another way to meet the requirement is to make a short presentation to the class on the “workshop” day. It’s important to have something tangible back from each participant to show how they can apply the information and have evidence of their participation.

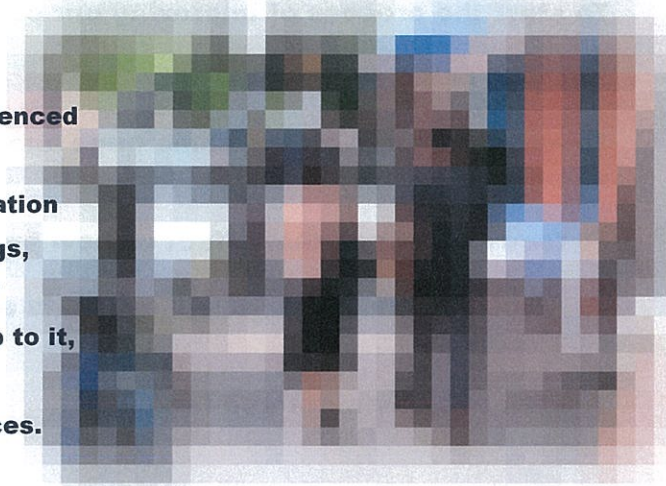
In this Fall semester, we added a new exercise to the first class to reinforce the Action Planning methodology. The winner at the top had action steps for a Doggie Park and won the \$10K! (pretend)

## “Mental Mapping” –A Walk in Your Neighborhood



**Nothing is experienced  
by itself,  
but always in relation  
to its surroundings,  
the sequences of  
events leading up to it,  
the memory  
of past experiences.**

– Kevin Lynch (1960)



Citizens Planning Institute Nov 2010

In the first class on “Planning, the Big Picture”, we have them do a quick 5 minute sketching / map exercise (mental mapping)- 2.5 minutes draw, 2.5 minutes feedback, to get them thinking about their physical environment. We ask that they draw the route they walk to a frequent destination in their neighborhood, and add as many physical details as they can.

Not as complicated as Kevin Lynch’s:

- Edges
- Nodes
- Landmarks
- Paths
- Districts

But an interesting exercise.

One woman was so inspired she did research before the next class to find out who owned the vacant properties along her route.

## Why Plan?

**To start the process of improving our communities.**

**To avoid reactive responses.**

**To keep everyone on the same page and to allow communities to speak with one voice.**

**To focus on issues that affect us now and later.**

**To make sure that everyone's interests are represented.**

**To attract investment and funding.**

Following are a few slides from presentations.....

Learning the basics of planning...and different scales of planning

**Just because it's in the plan  
doesn't mean it's going to happen!**



45th and Walnut, before



....Learn reality check- limitations of a plan and how long things can take,  
also the importance of a shared common vision

## Implementing the Plan



- **Communication**
- **Advocacy**
- **Teamwork**
- **Funders/Partners**



Especially the importance of engaging with other stakeholders—such as city council, business community,

That implementing the plan happens piece by piece, that it can take a long time, that it definitely requires cooperation. That the plan may change, but it will continue to serve as the impetus for growth, and the common thread that brings everyone together.

## ▶ THE COMMUNITY DESIGN COLLABORATIVE

COMMUNITY DESIGN  
COLLABORATIVE

### From Viola Street, a plan for reclaiming blocks

July 29th, 2013 — Clients — Service Grants

When you walk down the 4200 block of Viola Street in East Parkside, it's clear that residents are taking care of the block. The street and sidewalks are clean, there's a thriving community garden, and homes are well-kept. But the block's residents often feel they are working against a tide of steady neighborhood deterioration.

Abandoned homes and vacant lots are sprinkled throughout the block, but a particularly troubling cluster exists at the south side of the street. Residents founded Viola Street Residents Association (VSRA) in 2008 to advocate for reinvestment on their block and, ultimately, four adjacent blocks.

VSRA asked the Community Design Collaborative to put their "grassroots, resident-driven" vision down on paper. *Project Reclaim* is intended to complement the West Park District Plan.

Collaborative intern Anoeshey Rahim met VSRA's Community Development Coordinator and Viola Street resident Joyce Smith in July to talk about her neighborhood, what to do about vacant properties, and her own community revitalization journey.

COMMUNITY DESIGN  
COLLABORATIVE

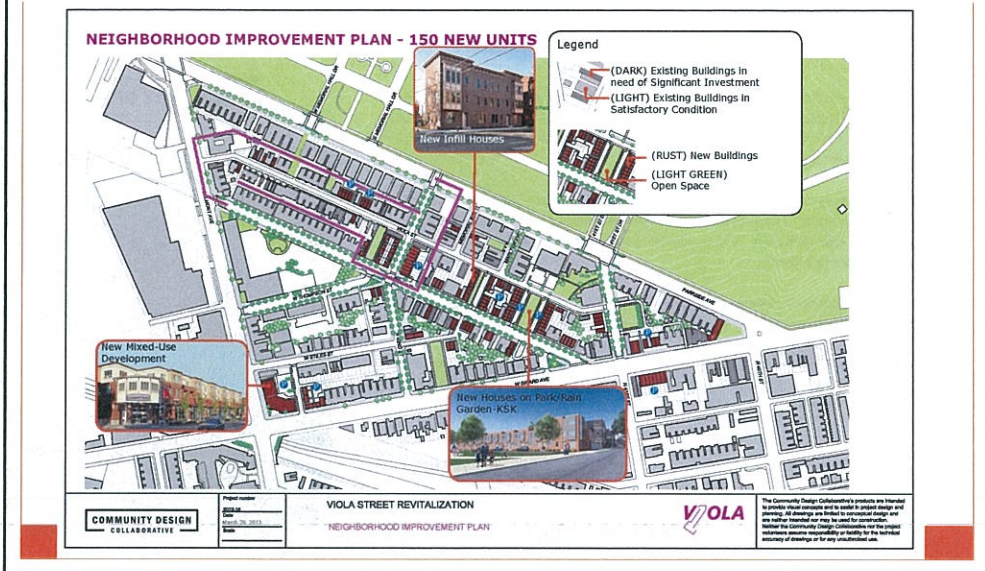


CPI grad spoke for 5 minutes at the first Fall session to talk about her journey from organizing her neighborhood through “Project Reclaim” - many vacant homes and lots sprinkled throughout her block- to engage with the Community Design Collaborative— and benefit from a service project-volunteers from design professions- planners & architects;

Great spokesperson for the Institute, as are many other grads.

# THE COMMUNITY DESIGN COLLABORATIVE

COMMUNITY DESIGN COLLABORATIVE



1 of 14 drawings completed through this project; from assessment of existing condition to recommendations that are actually attracting development.



## 3.1 Leadership

### Leadership Strategies for you

- For running a meeting
- For listening (harder than it sounds!)
- For fostering relationships
- Knowledge is Power!

### Organizational Power

- Vision and Mission
- Connection
- Procedures
- Knowledge is Power!

Citizens Planning Institute May 2011

Second part of session 2 gives participants an opportunity to examine their own role in a dialogue- weighing perspectives of others, how to reach a consensus opinion

Had 1 elective course on strengthening your organization, as this is also part of capacity-building.

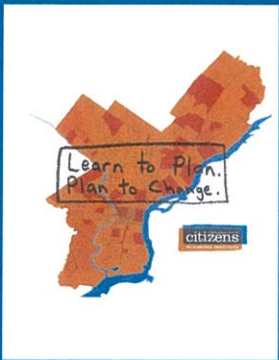
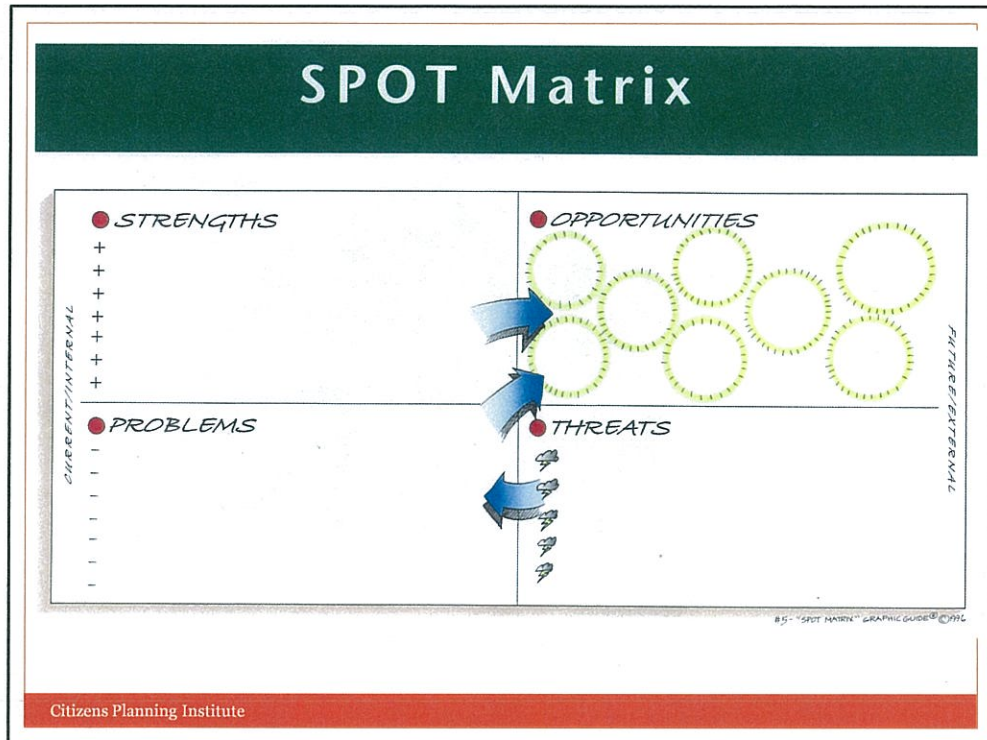
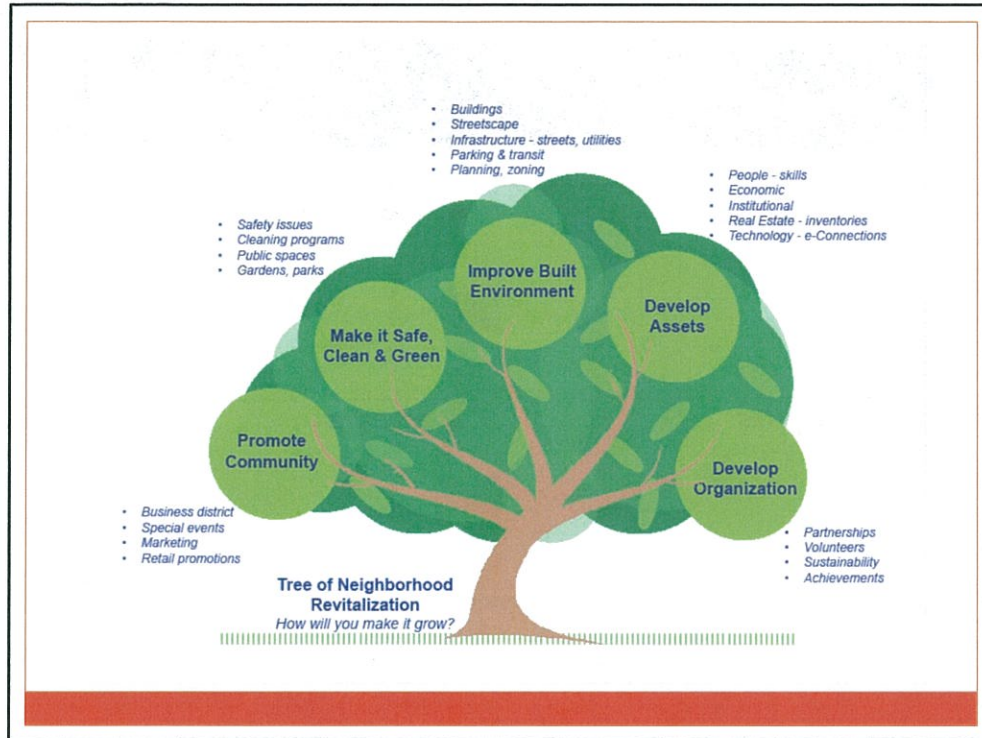
<h2 style="margin: 0;">Neighborhood Planning Workbook</h2> 	<ul style="list-style-type: none"> <li>• Chapter 1: Planning Overview</li> <li>• Chapter 2: First Step Planning- Goals &amp; Strategies Report</li> <li>• Chapter 3: Neighborhood Planning Steps</li> <li>• Chapter 4: Neighborhood Plan Elements</li> <li>• Chapter 5: Gathering Information About Your Neighborhood</li> <li>• Chapter 6: Holding a Successful Meeting</li> <li>• Chapter 7: Action Planning &amp; Implementation</li>   <li>• <b>Appendix A:</b> Philadelphia Districts Sequence Map</li> <li>• <b>Appendix B:</b> Philadelphia City Planning Commission</li> <li>• <b>Appendix C:</b> Websites related to Community Planning</li> <li>• <b>Appendix D:</b> S.M.A.R.T. Action Planning template</li> <li>• <b>Appendix E:</b> Neighborhood Mapping, Survey Forms</li> <li>• <b>Appendix F:</b> IAP2 (Intl Assoc. of Public Participation) Toolkit</li> <li>• <b>Appendix G:</b> Integrated Planning &amp; Zoning Process (PCPC)</li> </ul>
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Table of Contents from the “Neighborhood Planning Workbook” — developed for this program- acknowledge San Antonio’s Planning Department and their “Neighborhood Workbook- a step by step guide to neighborhood planning” content. Appendices are updated with each session.



Learning how to think about "assessments"



...how to think about their role in neighborhood revitalization...

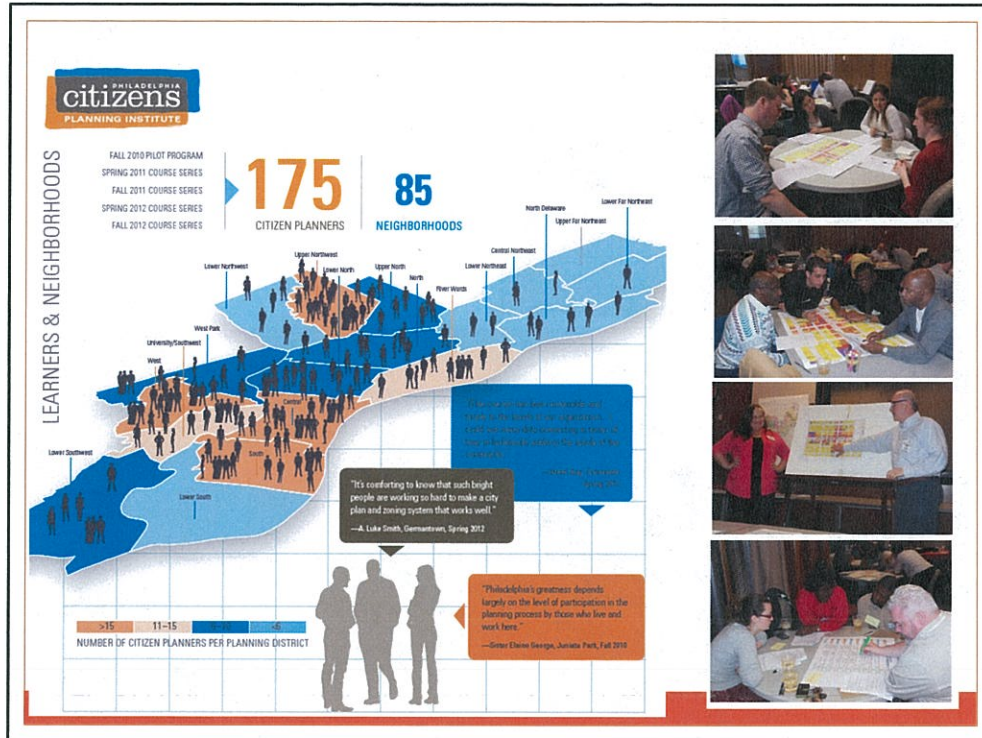
People participating in the program come from a wide variety of backgrounds and experience---from executive directors of CDCs to block captains, real estate professionals, Councilperson interns, commercial corridor managers, retired people, blue collar workers...

Cleaning and greening, social and community outcomes, political capital...



In January, we graduated the FALL 2012 class as part of our first annual 2035 progress report—standing room only crowd  
Mayor has been at 4 of the 5 graduations—this was the first one we got him in a group shot!

Phila2035 progress report- is a yearly calendar reporting on implementation metrics on the plan across city agencies.



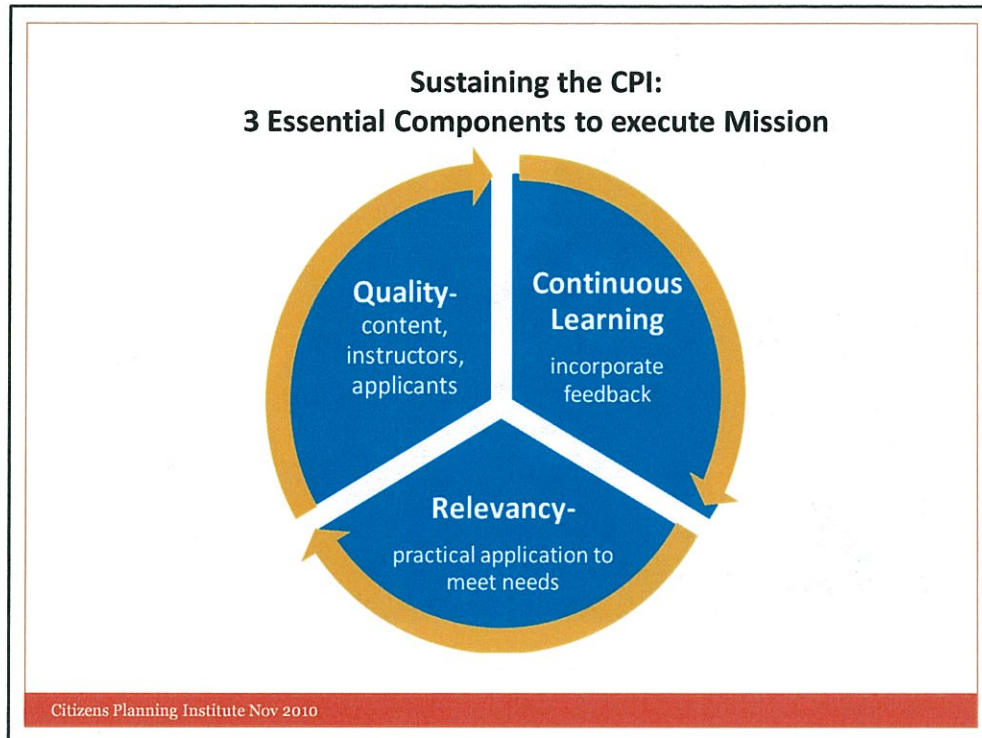
Which features CPI in AUGUST --will be updated in next year's calendar.  
 With this class, we'll be up to about 210 participants and 95 neighborhoods

In this class, we have *about* 23 neighborhoods represented—10 new ones  
 in this round, we have representatives of 10 NEW neighborhoods!

## June 2013 – Spring Graduation



This past June, we graduated the Spring 2013 class– and celebrated the adoption of latest district plans- Central, and Univ S/W



Several ways we get feedback--

Each class- 1 page evaluation form, on the class, instructors, what a key learning was, what question they still had, what they like best and what they would change....

Also do a focus group after each course completion—informal conversation about what they liked and how to do it better, in terms of networking, outreach, content, staying connected.

Also do an online survey summarizing what we heard in the focus group.

New this year, an external Advisory Board, with members from organizations not necessarily from the “usual suspects” planning world.



...“I learned a ton, and the program has inspired me to build new connections in my community and to think about ways that I can play a bigger role in developing it. It's also enabled me to participate in development discussion on a deeper level because I have a much better understanding of the zoning and planning process.”

...“**I loved interacting with people from across the city**, hearing from a myriad of highly engaging experts, and starting to apply the perspectives I gained from the CPI courses to my own neighborhood. ..“

...“I was very inspired by the various groups from neighborhoods that I never heard of before and their ability to make so many **positive changes** within this city. It was great to be able to meet with such positive thinking people...”

Here's some of the testimonials from participants...feedback is important for grant funding

## CPI and the Zoning Code

### New Zoning Code- Adopted Aug 22, 2012

#### Public and City employee training:

- 34 classes
- Over 320 participants

#### Community-Based Zoning Workshops:

- 3 sponsored by CPI grads in neighborhoods
- 3 at CPI classroom

#### ONE-YEAR Zoning Code Review- Public Feedback

- 6 “live” feedback sessions
- Online survey



CPI has become the brand for educational efforts from the Planning Commission... Massive public training last year on the new zoning code modeled on the CPI class structure- used paid consultants to deliver content.

Other activities...

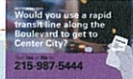
**Citizen Participation is a KEY part of planning!**



Also recruit CPI grads to assist PCPC staff with facilitation exercises in public meetings held during the district planning process...

## How we get the word out

Today we have a world of new tools:



### Provide information

#### **Phila2035.org**

Project Website

#### **Email Blasts**

HTML based

### Information & feedback

#### **Facebook**

Like Us – Phila2035

#### **Twitter**

Live Tweeting

#### **Philadelphia Planeto**

Blog

### The NEXT Level

#### **Textizen**

Code For America

#### **Community PlanIt**

Planning for Gamers




Relatively new page is “Grads in Action!” where we ask grads for stories about what they’re up to..


Home page always has the latest Application and course summaries.

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**citizens**  
PLANNING INSTITUTE



Flyer in your handouts.





## How do you engage?

International Association of Public Participation (IAP2)

- to share information
- to compile and provide feedback
- to bring people together

IAP2's PUBLIC PARTICIPATION TOOLBOX

TECHNIQUES TO SHARE INFORMATION

TECHNIQUE	THINK IT THROUGH	WHAT CAN GO RIGHT?	WHAT CAN GO WRONG?
<b>BILL STUFFERS</b>			
Information flyer included with monthly utility bill	Design bill stuffers to be eye-catching to encourage readership	Widespread distribution within service area Economical use of existing mailings	Limited information can be conveyed Message may get confused as from the mailing entity
<b>BRIEFINGS</b>			
Use regular meetings of social and civic clubs and organizations to provide an opportunity to inform and educate. Normally these groups need speakers. Examples of target audiences: Rotary Club, Lions Clubs, Elks Clubs, Kiwanis, League of Women Voters. Also a good technique for elected officials.	<b>RE/SI/ Keep it Short and Simple</b> Use "show and tell" techniques Bring visuals	Control of information/presentation Opportunity to reach a wide variety of individuals who may not have been attracted to another format Opportunity to expand mailing list Similar presentations can be used for different groups Builds community goodwill	Project stakeholders may not be in target audiences Topic may be too technical to capture interest of audience
<b>CENTRAL INFORMATION CONTACTS</b>			
Identify/designate contacts for the public and media	If possible, list a person not a position Best if contact person is local Anticipate how phones will be answered Make sure message is kept up to date	People don't get "the run around" when they call Controls information flow Conveys image of "accessibility"	Designated contact must be committed to and prepared for prompt and accurate responses May filter public message from technical staff and decision makers May not serve to answer many of the toughest questions
<b>EXPERT PANELS</b>			
Public meeting designed in "Meet the Boss" format. Media invited	Provide opportunity for participation by general public	Encourage education on the media	Requires substantial preparation and coordination

*For discussion at end...*

IAP2's public participation toolbox=- who is familiar?  
 About 60 different methods organized by techniques to share information, such as traditional media, bill stuffers, press packets, listserves, emails, printed materials, advertisements;  
 Techniques to compile and provide feedback, such as email and phone surveys, comment forms, community facilitators, interviews;  
 Techniques to bring people together, such as charrettes, workshops, fairs, focus groups, advisory groups, open houses, World Café, Open Space meetings, town meetings, tours

