[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]
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.
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

> 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
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

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.

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.

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.

- **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...
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.
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.
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.
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)

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!

....Learn reality check- limitations of a plan and how long things can take, also the importance of a shared common vision
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.
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 (VSRRA) in 2008 to advocate for reinvestment on their block and, ultimately, four adjacent blocks.

VSRRA 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 Anushaeha Rahim met VSRRA’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.

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.
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!

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.
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!
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 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...
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:

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<tr>
<th>Provide information</th>
<th>Information &amp; feedback</th>
<th>The NEXT Level</th>
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<tr>
<td>Phila2035.org</td>
<td>Facebook</td>
<td>Textizen</td>
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<tr>
<td>Project Website</td>
<td>Like Us – Phila2035</td>
<td>Code For America</td>
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<tr>
<td>Email Blasts</td>
<td>Twitter</td>
<td>Community PlanIt</td>
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<td>HTML based</td>
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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.
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**

<table>
<thead>
<tr>
<th>TECHNIQUE</th>
<th>How It Works</th>
<th>What Can Go Right?</th>
<th>What Can Go Wrong?</th>
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<tr>
<td><strong>MEETINGS</strong></td>
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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.