

APA

Oklahoma Planner

President's Notes

Four years have gone by quickly. As the out-going chapter president, I reflect back over the last four years of accomplishments and look forward to the continued growth and development of the chapter and the profession.

I set several goals when elected in 1999. We've built the chapter finances to an acceptable level, which allows services to be provided at reasonable costs. A successful continuing education program has been created and recognized by the APA at the 2001 National Conference with the Karen B. Smith Award for Chapter Excellence. Until 2001, the chapter was virtually unknown at the state capitol. Since that time, several bills have been introduced to improve community planning and strengthen the profession. Last year, we jointly held a reception at the capitol with the Oklahoma Floodplain Managers Association and legislation passed both houses that would have limited appeals of zoning

decisions and condemnation cases. Unfortunately, we still have a mountain to overcome in modernizing our enabling legislation. Oklahoma is one of a handful of states with antiquated statutes regarding zoning and planning.

The chapter has strengthened the relationship between planners and students. For the second year, the chapter has sponsored a welcome back reception for planning students. In an effort to increase student membership, the chapter has paid for "chapter only" memberships for students. As a result of this initiative, student membership rose from zero to 13 - 15 in the first year. Carl Weckemann was the first recipient of the C. Robert Goins, AICP award for the Outstanding Student in 2002 and received a \$500 scholarship with the award from the chapter.

An award that I am especially proud of is the successful nomination of J. Lee Rodgers, FAICP, to

the AICP College of Fellows. Professor Rodgers was the first graduate of the OU Planning School and for nearly four decades directed the planning program. Many graduates have contacted me thanking the chapter for sponsoring his nomination.

The chapter has received several APA, AICP, and CPC grants over the last four years. Through these sources, the chapter has a continuing education program and a web presence and is currently working on creating a digital planning commissioner education program.

I don't want to take credit for all these accomplishments, but do want to express my appreciation to all those involved with moving the profession and the chapter forward. From the bottom of my heart, thank you for support and for the opportunity to serve the state as chapter president.

Mike

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Upcoming Events:

- **Rocky Mountain Land Use Conference: October 16-17 in Denver**
- **OKAPA Executive Committee meeting: October 16th in Sand Springs**
- **Planners Day at the Capitol: February 2004 in OKC**

See website for more details.

Ten Tips for Better Plans By Dennis I. Elpern, AICP

Like many of you, I believe that comprehensive plans (i.e. the plan of conservation and development) should be the centerpiece of what we do as community planners. But, let's be honest. Most plans are ineffective, poorly constructed, too general to be taken seriously, and constrained by enabling legislation that's way behind the times. In far too many cases, plans are viewed as some sort of fancy land use guide to be trotted out from time to time for support but otherwise kept under wraps. No wonder so many plans are dead on arrival.

If comprehensive plans don't work, then communities aren't planning for the future. So, how can we make them better?

First, let's spell out what a plan should accomplish. At the very least, a plan should tell people two basic things: what it is you intend to achieve (goals) and how you intend to do it (recommendations). That is, what do you *plan* to do? If you can't answer that, you don't have a plan. Here are some tips to help:

1. Separate the Plan from Background Studies and Implementation.

Too many plans mix background studies with the goals and recommendations of the plan. While the plan should definitely evolve out of your studies, people shouldn't have to search voluminous texts to find out what's being proposed. This is more than time-

consuming; it obscures the recommendations of the plan and saps its effectiveness. Your report should have three distinct sections: the background studies, the plan itself, and an action plan for its implementation. Though all must relate to one another, they should be presented separately.

2. Formatting Goals and Recommendations

Make certain the document is formatted so that it's easy to use and that the goals and recommendations are easy to find. You shouldn't be the only one in town who can tell if a proposal is in accordance with the plan. Each goal should be followed by a set of related recommendations that structure the plan for its eventual implementation.

3. Be Specific.

Granted, goals are by nature general (they've got a lot of ground to cover), but your recommendations should be specific and to the point. What roads should be widened? Where and how should the zoning regs be amended? What sites should be acquired for open space? This is not the place for fuzzy language or half-baked ideas. General plans are lazy plans.

4. Good Presentation.

Unfortunately, I've seen too many planning documents that value style over substance. Nevertheless, the document should have at least some eye appeal to encourage people to read it.

Do the usual: lots of white space, subsections with headings to divide up lengthy chapters, and a detailed table of contents. Most important, your reports should be well researched (yeah) and well written (yeah yeah!). Avoid jargon and cliches like the plague.

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Exam Fee Reimbursable Under GI Bill

Congress passed a revision to the GI Bill Education program in March 2001 that includes additional licensing and certification examinations. AICP submitted an application to have its certification credential included, and the application was approved on December 26, 2002. This means that military veterans (and their surviving dependents) who are also approved AICP applicants (meaning they have paid the registration fee to AICP and taken the exam), can now ask the Veterans Administration to reimburse them the fee.



Veterans interested in the GI Bill Education Benefits Program may visit the website <http://www.gibill.va.gov> or send an e-mail to AICPexam@planning.org

2004 AICP Exam to Go Electronic

Starting in 2004, the AICP exam will be given electronically. In addition to having the exam administered electronically, AICP will be giving the exam twice a year. There will be two windows in which the exam can be taken, one in May the other in December. There will also be two application deadlines, December and June. More exam sites will be provided making it easier for participants to take the exam. There will be 350 sites across the coun-

try where the exam will be offered. When an applicant takes the exam there will be a half hour tutorial at the beginning that does not count against the three hours allowed to the test taker to complete the exam. AICP also plans to provide some information and possibly an example CD of how the test will be administered.

Giving the exam electronically will allow for providing participants with faster results. Using the computer also

allows for providing better exam graphics. The first year the exam is given electronically it will take two weeks to provide participants their results. These two weeks will be used to double check the testing system and results. Eventually the test taker will be able to receive their results before leaving the test site.

This past year the recommended readings have been updated and are on the APA website at <http://www.planning.org/certification/selectedread.html>

Mandatory Professional Development in the Age of Pragmatism

By Jack E. Molenaar, AICP/PP

Planners involved in the leadership of APA at the national level have been debating, fairly regularly, the issue of mandatory versus voluntary continuing education for AICP members over the past four years. This debate resulted in a “pilot” mandatory continuing education program for three chapters: New Jersey, Ohio and Western Central. The program that was tested has not done well, mostly because of the paper work that was required of the volunteer officers of the chapters. How can a pilot be mandatory without any sticks? It has been pointed out by more than a few that a mandatory pilot is an oxymoron, but that is a story for another article. To understand why anyone would want any mandatory education program you really have to ask the question, “What are we trying to accomplish by imposing mandatory education on our members?”

As a former two-term President and two-term Treasurer of the New Jersey Chapter I have seen the seedy side of trying to set up programs, trying to break even on costs all without burning out volunteers within our chapter. Anyone who works in, or with, non-profits knows it is a daunting experience, and you will burn out if not for the occasional meeting at the local watering hole. So why are we expending so much energy on a program that seems to require so much additional effort on the part of our members? What are we trying to accomplish within the dark rooms of APA leadership? What problem(s) are we trying to solve?

The problems I have been trying to solve have been the lack of good affordable professional development opportunities for all our members, both non-AICP and AICP, and the lack of involvement of the typical member in their own organization. I believe that these two issues are intricately linked. In order to have more quality affordable opportunities for all APA members you need people to organize and run them. This means using volunteers,

especially if we want programs to be affordable. The Chapter Presidents Council of APA (representing 46 chapters around the country) has discussed and set as a priority the issue of affordability and access to more and better programs because at the chapter level, that is what we deal with regularly. How do we get educational programs to members that may be cut off from the rest of us because of a lack of funds, or even by physical distance? Remember, that any program that is created has to work as well in New York City as it does in Montana.

Another problem with a continuing education program is the “education” label itself. How do we determine what programs should be allowed for “credit”, AICP or other wise? As an organization that has policy statements or papers on many planning related issues, this goes to the heart of the ‘What is Planning?’ question. I will not even attempt to cover that beast in this article.

After looking at the issues and the problems that need to be solved in order to make a stronger organization of better-informed, well-rounded planners, I have come to the conclusion that mandatory continuing education is the wrong solution. That is why I propose a program of mandatory professional development. This is a slight difference but a critical one. We are a profession with many faces and hats. It is very difficult to be a planner without knowing a little bit about everything. How do we learn anyway? I believe that we learn not just from sitting in a class or attending a conference. We learn from talking with each other over a cup of coffee, from discussing issues with residents at a public meeting, from helping out other organizations or community groups, from running a conference, from advocating for changes in our own state’s planning related legislation, from lobbying for positive or not-so-positive change, from mentoring students at all levels of the educational ladder, etc. If we look at education/

learning more globally, it automatically leads us to professional development and isn’t that what we should be encouraging to any planner with the AICP designation? Do we really want planners with that designation stuck in their offices for years without any contact with another planner? It’s time to drag these planners out of their offices and bring them back into the family of planners. It’s time to pull together as an organization and help each other push the planning agenda to the forefront so we can all move forward - together.

Obviously voluntary requirements (oxymoron anyone?) don’t cut it. We have been testing voluntary compliance since 1979, I think we can safely say that we need some changes. Why not make a new program that is both simpler and self-reporting? Every year APA asks us to be honest when reporting the salary range we fall into during dues time. Has anyone from APA called you to check up on your salary level to ensure that you are being honest? Of course not, it would be ridiculously expensive and time consuming with no benefit. Why can’t we create a system of self-reporting annually of the learning activities in which each member has been involved over the past year? APA staff would only audit a set number of members each year to check on its validity. If you don’t meet the requirements or if you are dishonest about what you actually did, then there would be sticks. This is a very general concept, and the details of what should be considered a learning activity should be debated and kicked around. This is where you come in.

I strongly believe that our profession needs more learning opportunities and more involvement of its members in its own organization. I have offered one proposal to meet these two problems. What is your solution? Add your voice to this important discussion and let’s come up with a program that is of high quality and low cost for all planners in APA! Let’s not leave any Planners behind!

Ten Tips...

(Continued from page 2)

5. Graphics.

While your graphics need not be fancy, they should be easy to read and understand. If you can't cram everything onto one plan map, do two or three (say, one for land use, one for public improvements and acquisitions, and one for environmental protections). Don't be afraid to include detail maps for congested areas. Your readers shouldn't need a magnifying glass to see what's proposed. And, don't feel you have to litter your plan with lots of small photos that do little (e.g. "here's a house," "here's a road") but jack up printing costs. A few good illustrative photos are better than a bevy of bad ones.

6. Key Issues.

Your plan should concentrate on key issues, not everything under the sun. After all, you're writing a plan, not an encyclopedia. Focus on the important things that should be done to help achieve your goals. Forget the diddly that don't mean squat. And, don't bulk up your background studies with stuff that government has no control over. After all, this is first and foremost a plan of government action.

7. State and Regional Issues.

It's amazing how many plans ignore state and regional issues that will greatly determine the future of the town. Far too many plans relegate "regional issues" to a superficial description of surrounding towns and, if they're really ambitious, a word or two about major roads and a map that puts them at the center of the universe.

Do more. Talk about economic development, environmental protection, transportation, and other regional issues that will do much to shape future development in the community. After all, you don't live on an island—why plan as if you do? And, even if you can't control the world around you, at least recognize these outside forces and propose ways of dealing with them. Consider recommending changes to the [Oklahoma]

General Statutes, for if we're serious about planning for the future, enabling legislation that's out-of-date shouldn't hamper us. Let's all pressure the state legislature to adopt smart growth initiatives, and let's talk about such things as urban growth boundaries and the "new urbanism." Portland, OR shouldn't be the only place that gets to have all the fun.

"Merely creating a list of recommendations will not, in itself, ensure successful implementation of the plan. Priorities must be set, responsibilities assigned, actions scheduled over time, and costs determined and budgeted."

8. A Management and Budgeting Tool.

Don't view your plan as a stand-alone document or else it will most assuredly stand alone from everything else going on in city hall. Structure your plan with the idea that it's going to be used by the mayor or [councilman] as a management and budgeting tool to change how you do business. That also means you've got to get other departments to buy into the plan recommendations. Make it clear you don't intend to focus on minutiae. You intend to focus on ways and means of moving the community forward beyond the status quo.

9. Implementation.

Which brings us to implementation. For your plan to be effective, you've got to do more than include a general discussion on zoning and subdivision regulations and perhaps a word or two on capital improvements programming. But, merely creating a list of recommendations will not, in itself, ensure successful implementation of the plan. Priorities must be set, responsibilities assigned, actions scheduled over time, and costs determined and budgeted. This is where your chief executive comes into play, since it is he/she, and not the planning commission, who typically sets priorities, directs staff, and prepares budgets. An action plan should include all recom-

mendations and then identify for each which department will act as lead agency, the capital expenditures required, and when it's going to be done.

10. Easily Updated.

Finally, make it easy to update your plan, and be flexible. New issues arise all the time and priorities always change. Don't ignore them. Place the plan in a binder so you can easily update material, add new text, and revise recommendations. If your plan doesn't remain current, it will become obsolete, usually sooner than later.

Comprehensive planning goes to the very heart of what we do and who we are as planners. People may have great ideas that can inspire the community to do great things. But, to secure the promise of the future requires more than a vision of the future. It requires a well-designed plan to make it a reality.

This article was taken from the Illinois *Planning News*, Summer 2003.

The Oklahoma Chapter of the American Planning Association sent out ballots for the following 2 year term positions:

PRESIDENT

TREASURER

BOARD OF DIRECTOR

Ballots can be submitted by fax, or snail mail to **Mike Southard** and are due on **October 16th**. As the new executive committee assumes office, committee volunteers will be needed to share responsibilities.

Regardless of your expertise, we will find a spot for you to serve the profession and the state.

Oklahoma Planners and Students Discuss Ethics

By Sarah Jo Peterson, Ph.D.

“Remember the cardinal rule of public service: above all else ask who stands to profit and who to lose by virtue of the recommendations, decisions, or actions you initiate. Once you know the answer, be able to apply a standard of morality, fairness, and equitability that will stand the test of close scrutiny. If you find yourself losing sight of this rule, it’s probably time for a rest, a new job, a career change, or early retirement.”

—What Do I Do Next? A Manual for People Just Entering Government Service, by Warren Jones and Albert Solnit (Planners Press)

With this quote, Gail Easley, FAICP, Former AICP Region 3 Commissioner, and Mike McAnelly, FAICP, Former Texas Chapter President, launched the second OKAPA-OU Back to School Luncheon, held September 5th at the University of Oklahoma’s Memorial Union.

During the Planning Ethics Workshop’s morning session, students and faculty from the Division of Regional and City Planning joined with practicing planners in informative -- and sometimes heated -- discussions about the ethical response to difficult, but unfortunately all-too-typical, planning scenarios. What should you do when a developer offers your child a summer job? How do you handle being asked for a professional assessment without being given the time to do a proper study? How do you respond when your boss asks you “to cook the numbers”? What should you do if your community is using land regulations to discriminate against disadvantaged groups?

After lunch, the planner-student teams reported their answers to the entire group. Mike and Gail reviewed the AICP process for overseeing charges of unethical conduct and responded to queries about the “best answer” from

the AICP perspective. Dean Bob Fillpot, College of Architecture, also joined in the discussion.

The OKAPA’s sponsorship, over the last two years, of the Back to School Luncheon and workshop has offered RCPL students excellent opportunities to meet practicing planners and to get a feel for what it’s like out in the “real world” of planning. We, RCPL’s students and faculty, express our appreciation to OKAPA and hope it’s the beginning of a renewed tradition.



National Charrette Institute (NCI) Charrette Checklist

By Bill Lennertz and Steve Coyle

The term charrette is overused and abused. The result has been a widely misinformed and sometimes negative perception of the process, causing difficulty for citizens and professionals alike. NCI believes the following nine strategies are essential for charrettes that result in transformative community change.

1. **Work collaboratively:** Create a long-lived plan based on each individual’s unique contributions.
2. **Design cross-functionally:** Multi-disciplinary teams work concurrently to build a feasible solution from the beginning.
3. **Use design to achieve a shared vision and create holistic solutions:** Design illustrates the complexity of the problem and can be used to resolve conflict by propos-

ing previously unexplored solutions that represent win/win outcomes.

4. **Work in detail:** Lasting agreement is based on a fully informed dialog.
5. **Constrain work schedules:** Time compression facilitates creative problem solving by accelerating decision-making and reducing unconstructive negotiation tactics.
6. **Communicate in short feedback loops:** Regular stakeholder input and reviews quickly build trust in the process and foster true understanding and support of the product.
7. **Work for at least four consecutive days:** Four days is required

to accommodate three feedback loops, scheduled at least a day apart. Three loops are the minimum required to facilitate a change in participants’ perceptions and positions.

8. **Work on-site:** Working on-site fosters participant’s understanding of local values and traditions, and provides the necessary easy access to stakeholders and information.
9. **Produce a buildable plan:** The success of a community’s work to plan and build together hinges on the implementation tools such as codes and regulating plans.

For more information about NCI, see <http://www.charretteinstitute.org/>



**OKLAHOMA CHAPTER OF THE
AMERICAN PLANNING ASSOCIATION**

1612 N Broadway
Shawnee, OK 74804

Phone: 405-214-0103
Fax: 405-878-1587
Sheila Southard
SheSouthard@aol.com

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WWW.OKPLANNING.ORG



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Mkp@gty.ci.henderson.nv.us

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Mccatak@aol.com

Director (Region 3)

Bob Hunter, FAICP
Execdir@plancom.org

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dl@planningcommunications.com

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Sam Casell, FAICP
sam@planningauthority.com

Commissioner (Region 3)

Chandra Foreman, AICP
Foreman@cutr.usf.edu

OKAPA Officers

President

Michael Southard, AICP
Msouthard@shawneeok.org
405-878-1665

Vice-President/PDO

Jan Ramseyer-Fees, AICP
Jan.fees@ci.edmond.ok.us
405-359-4796

Treasurer

Steve Boettcher, AICP
Sboettcher@incog.org
918-584-7526

Secretary/Newsletter Editor

Richard Rolison, AICP
Rrolison@cityofsapulpa.net
918-248-5917

Board Of Directors

Donna Sorrells
Dsorrells@incog.org
918-376-1543

Jim Coles
jcoles@ci.tulsa.ok.us
918-596-2600

Planning Official Development Officer

Bob Wolfram, AICP
Rwwolfram@ci.sand-springs.ok.us
918-246-2573

Webmaster

Nancy McNayr, AICP
Nancy@mcnayr.net
405-942-3391

OU Planning Faculty Liaison

Richard Marshment, Ph.D., AICP
Rmarshment@ou.edu
405-325-2399