

Transportation and Housing Alliance Toolkit – First Edition

Meeting the Needs

We’ve got the data and maps – now what do we do with them?

You have probably been exploring ways to use what you have learned while gathering the data, mapping it, and completing the analysis. Your analysis may highlight a specific lack of housing, underscore the need for enhanced services, or define an area where an improved transportation network should be provided. If you have built a broad partnership during the first phases, it will be easier to develop an action plan. If not, following some of the steps outlined in this section will get you started.

Whose job is it to meet the transportation and housing needs of persons with disabilities?

Addressing the increasingly complex relationships between transportation, housing and land use requires an ‘all hands on deck’ approach. Suburban development patterns have caused most new housing to be built farther away from activities and employment, and in areas where walking, wheeling, and transit are not viable options. Fortunately, most of the physical infrastructure improvements that will benefit persons with disabilities will also make it easier for seniors, kids – and pretty much everyone else – to get around. The wider you are able to cast your partnership net, the more support for funding improvements you will be able to generate.

Connecting the Dots

Making connections between projects isn’t hard – once you get in the habit of asking the right questions. Sometimes it can be as simple as reading two articles in the same newspaper, and thinking “Those people ought to talk to each other.” Asking staff from different programs or agencies to work together on a specific project can yield great results. They often have great ideas about their specific program or client needs. What if we linked those ideas – and resources – together in every public project or policy – as a matter of course?

In an era of increasingly limited resources, one effective role of state government is to provide the connections, linkages, technical assistance, policy changes, and enabling legislation to assist local governments, nonprofits, and private developers with innovative practices and projects.

How do we meet the needs?

This section outlines several steps to move plans, projects, programs, and policies forward. These include:

Incorporate what you learned into a Plan

- Locality Comprehensive Plans, community plans, or transportation studies
- Regional and State transportation plans
- Service Provider long-range plans
- State Housing agency investment strategies
- Coordination Plans for services and transportation

Create an Action Agenda

- Incorporate specific, measurable implementation steps and performance measures into long-range plans
- Identify lead agencies or individuals
- Include short-term, visible projects to maintain momentum

Identify related Programs and funding possibilities

- Use projects in specific places as a target for broad support
- Using an ‘all hands on deck’ planning process, tie together affordable housing projects with street improvements, recreation, and improved transit

Pick a Priority Project

- Infrastructure improvements in priority neighborhoods & ‘hot-spots’ (identified by data review and field audits)
- Improved transit service to key destinations
- Selecting preferred locations for housing projects
- Connections between housing, employment, and activity centers
- Developing or expanding targeted services

Harness the Power of Partnerships

- Coordinate public & private infrastructure investments
- Use public planning processes to identify good locations for housing projects

Develop Policy Recommendations

- Statewide - agency focused and legislative policies
- Local government funding and regulations
- Non-profit and service providers
- Private & Public housing investment strategies

Facilitators' ToolBox: Process tips for community-based charrettes

Harrison Bright Rue

Citizen Planner Institute

These guidelines are for hands-on 'table design' sessions – where small groups work around maps together, typically held in the latter half of a community-based charrette (all-day or two evening sessions). The morning session – usually with the whole room working together – uses word-based exercises to create a vision, and to discover and prioritize problems and opportunities. During the morning, design team members present a slide show of example problems, designs, and solutions to stimulate discussion. A short lunchtime show – tied into the morning's discussion and priorities – leads directly into the table design sessions. These tips are excerpted from CPI's hands-on facilitator training workshops.

Goals & Assumptions:

- Agree to work together, not to agree on everything.
- Generate innovative, workable solutions to real problems.
- You won't create a final product in one day.
- Be creative during brainstorming.
- Use critical thinking to refine ideas
- Work toward consensus on central elements

Working Methods:

- Set a flexible agenda with clear goals
- Outline what you plan to do today; give clear instructions to the group.
- Adjust timing and focus as you go.

Table design session tasks

1. Break into small groups around the tables.
2. Work together to generate ideas
3. List & draw your ideas on the map
4. Try to solve the problems uncovered earlier.
5. Summarize your table's ideas and report back

Mix it up

- Call to the tables: gather the troops.
- Work with folks you don't know.
- Six to twelve at each table.
- Sit down & beckon others to join.

Introductions:

- Have everyone introduce themselves
- Note previous community efforts
- Mark on the map where you live or work.
- Highlight business, church, kids' school, parks

Don't forget the 'hats-off' rule:

Everyone should participate and generate ideas – elected officials, staff, property owners, developers – without impacting later decision-making roles.

- Contribute your knowledge & energy
- Look beyond your usual role & limitations.

Start marking up the maps

- Mark the schools & parks (GREEN)
- Mark public facilities – civic centers, transportation centers, even bus stops (RED)
- Water/canals (BLUE)
- To make a route pedestrian/bike-friendly, draw trees (GREEN CIRCLES)

Don't worry too much about colors– you'll inhibit spontaneity – this is just to get things going

Use consensus-based process:

- Brainstorm
- Discuss
- Decide

Be Flexible

Go back and forth naturally between modes. Don't lose the flow of ideas.

- Bounce ideas off each other - take off on another's thought.
- Brainstorm for 10 or 15 minutes
- Discuss/ analyze, then switch back
- Take turns around the table - to make sure the quiet thoughtful ones get heard.

When brainstorming:

- Encourage each other. There are no bad ideas.
- Don't interrupt - make notes if you disagree.
- No criticism of another's idea during brainstorming.
- Initial thoughts don't have to be complete or defensible.
- Write everything down on the map
- Spend more energy listing or drawing ideas than analyzing, or saying why it won't work.
- Keep the juices and ideas flowing.
- Think freely and have fun.

When discussing:

- Evaluate, compare, weigh ideas.
- Look for linkages between topics before choosing between them.
- Look for win-win solutions

- ❑ Be practical, but don't get so bogged down in details that you can't produce good ideas.
- ❑ Think of short-term & long-range projects.

When deciding and summarizing:

- ❑ Look for ideas most people are excited about, and all can live with - not ideas everyone thinks are ok, but nobody loves.
- ❑ If you don't agree, present both points of view at the end.

Reminders:

- ❑ You are there to listen, question, and prod, not to lead the discussion
- ❑ Don't write everything down yourself.
- ❑ Just get things started & keep them moving

Encourage all to take part

For problem talkers, use group rules & exercises:

- ❑ Give them a pen to write down their idea
- ❑ Turn to some one else and ask them to expand on or link to it
- ❑ If repeating the same issues, point to where it's already written down.

Take turns talking, as needed

- ❑ Have people share ideas one-on-one
- ❑ Ask them to repeat their partner's ideas & write on the map.

If all else fails:

- ❑ Take a few deep breaths. Take a break.
- ❑ Go outside and jump up and down.
- ❑ Ask the moderator for help.

The power is in the pen

Make the notes public, and on the map – not a 'one-person' list (until group summarizing at end)

- ❑ Get everyone's handwriting on the map
- ❑ Point to the notes if people repeat themselves.
- ❑ Every idea is good at first.

Mark up the map!

If someone is shy about drawing/markings to start:

- ❑ Don't do it yourself first – 'start the line'
- ❑ Ask another to note/sketch their idea
- ❑ Check with them to see if they got it right

Write it down!

- ❑ Don't skimp on supplies. Have enough colored markers (*Mr Sketch Washable*) & pens (*medium Sharpies*) for each person to use one.
- ❑ Remind people to write down everything they want to say - "If it's not on the map, we won't remember it."

Move into regional issues

Ask how neighborhoods and systems connect

- ❑ Where does traffic come from & go to?
- ❑ Where & how do people want to get around?
- ❑ Where does the water flow?

Look for linkages

- ❑ How do better sidewalks fit with accessibility to transit, jobs, shopping, and civic areas?
- ❑ Where do those ideas link with greenbelt parks and bike trails?
- ❑ Which block or street needs work to make those connections? What kind of work?

Sketch the solutions

- ❑ Have the design team sketch one or more solutions for each table.
- ❑ Wait till specific sites and ideas are generated.
- ❑ Choose different ideas for each table, but include linkages (physical and thematic)
- ❑ Look for potential 'model projects'; both early-start & long-term.

Identify champions early

- ❑ People who are enthusiastic & fair-minded
- ❑ Those who listen to others; those who others listen to.
- ❑ Don't let some one with a specific agenda take over the group.
- ❑ Identify someone to report back at the end

Reinforce every idea!

Discourage passivity. Encourage passion.

- ❑ Use more intervention or stimulation.
- ❑ Use open-ended questions to stimulate thinking.

Final steps

- ❑ Ask people to comment on what the table produced. "Did we cover everything? Anyone's ideas missed?"
- ❑ Choose a "reporter." Have them summarize main ideas on big paper notes.
- ❑ Record 'votes' only if there is no consensus
- ❑ Have everyone sign their name on the map.
- ❑ Tape any small drawings to the map.
- ❑ Put your table number on all the papers.

Pin up the maps

- ❑ Each table reports back to the group.
- ❑ Record each presentation (notes, video).
- ❑ Celebrate!

Foundation blocks of citizen planning

This manual introduces basic truths that are the foundation blocks of Citizen Planning and community development – and a pathway to change how your community works.

It's all connected.

Looking at communities, economies, and natural systems as a complex interconnected whole makes it much harder to talk about any one project or issue. Questions always lead somewhere else. Fortunately, sometimes that complexity can include better solutions, a new funding source, or more allies.

It's not just about the money.

Appropriate design does not usually cost more, and can often save money in the long run.

You can make a difference.

That's an age-old truth, and central to this work. You can learn to be more effective, discover useful tools, and hear about people who have made change in their communities. You can learn to identify what's wrong in your community and what kind of change is needed.

You have to start somewhere.

It's best to start with what you know. That might be your own street, your kid's school, your church, a civic group, or a project you're already working on. Just because the problems are big, doesn't mean that you have to solve them all at once.

We've all helped cause the problems.

It can be hard talking about what's wrong with our communities without appearing to blame particular individuals or groups – like traffic engineers or developers, environmentalists or bureaucrats. Yet most of us drive cars, want our own houses, like to visit untouched natural areas, and would prefer to have someone else take care of the messy details of civic life. There are very few clean hands among us.

It will take all of us to fix what we've broken.

Working with people you don't agree with, or who have very different interests, is a good way to find creative answers. You can learn how to get groups to work together effectively and efficiently, and how to break down barriers between projects and agencies that keep common-sense solutions out of reach.

Design makes a difference.

The details of how a place is put together help determine how well it works. These time-tested principles of place-making govern how buildings, streets, and natural areas can add up to more than the sum of their parts, while making our public investments go farther and preserving our environment for future generations.

You can learn just by looking around you.

Most communities still have at least fragments of neighborhoods that work fairly well. These places with “*Good Bones*” are often in historic districts, Main Street, or near older transportation corridors. They are also often threatened by surrounding conventional development. Learn to compare patterns, figure out what works, and what to do about it.

Average folks are able to see the big picture.

Most problems in our physical environment are solved by people whose job is to look at only one piece – moving cars faster, draining water quicker, bringing one big factory to town, building schools or houses cheaper. If you live in a place, and plan to stay, you are often able to see the big picture.

Public servants can rise above their current job descriptions.

Reward those who make mistakes trying out new ideas or methods. Expect staff to help you create a meaningful, practical, visionary plan for your community – not just wait to review developers’ plans. Expect the people who make decisions about your community to act as if they lived there; as if their own children walked on the sidewalks; as if their parents had to cross the dangerous intersections.

The people who live in a neighborhood know how it works.

They know how it came to be, who and what is important, and why. No professional planner or designer should make decisions or assumptions about a community’s future without real input from the residents.

Language can get in the way.

Using techno-babble can obscure important issues. Traffic engineers talk about road “improvements” when they mean widening. Each profession has its own confusing vocabulary and acronyms. Using plain language can let more people understand complex issues – and get more brains working on creative solutions.

Simply asking questions is a powerful tool.

“Why?” is one of the most powerful words in the English language. “Because that’s the way we’ve always done it” is one of the weakest (and most-used) answers. “Because those are the rules,” “That’s agency policy,” and “It’s required by standards” are tied for second. Ask to see a copy of the rules/policy/standards in writing.

This manual will not make you an expert in one discipline.

It will equip you to talk with other professionals knowledgeably, and to help them understand your own discipline or neighborhood.

You can look through new eyes.

If you read this handbook, and do the RoadWork, we guarantee you will never look at your community – its buildings, streets, and public spaces – the same way again. You may be able to avoid unnecessary battles, and to win the ones that count.



Walking around the neighborhood together – and discussing what you see – is a good kick-off for a community-based planning workshop. *(Dover, Koh)*



Organize ‘WalkAbouts’ or field audits to measure and photograph in more detail – like these Honolulu Street Doctors. *(UH Manoa)*

Creating an Action Agenda

Harrison Bright Rue

Use the conference sessions to create an Action Agenda. Most conferences are a good place to connect with other people, swap stories, and learn a few things – but we walk away thinking we could have done more. Follow these tips to turn the typical ‘talking heads with great ideas’ format into nuts-and-bolts, hands-on workshops with a rousing, action-oriented finish – and a short list of simple, common sense action items for participants to take home and work on.

We’ll create the Action Agenda by listing suggestions and impediments at each conference workshop, then filtering them through a consensus process at the closing session. Make sure you have a mix of people who have tried new ideas locally, plus folks who have successfully implemented change elsewhere. A good Action Agenda could be written by many attendees on their own – but what counts is the process used to come up with it – and the resulting ownership.

1. **Change the Question & Answer period at the end of each presentation or panel.** Use it as a group brainstorming session to address two questions: 1) What impediments keep us from implementing creative projects? And 2) What rules and practices can we change to make it easier to ‘do the right thing?’ Ask panelists to kick off the brainstorming with a sample impediment/solution. Encourage people to move from complaints to positive suggestions. The purpose of defining the impediments is to find leverage points to remove the barriers.
2. **Assign a scribe for each brainstorming session or table.** Have them write down the ideas on flip charts – labeled with workshop name. If there are a lot of ideas, spend a few minutes testing for the most popular. Winnow them down to the top ten impediments, top three solutions (good solutions will address multiple barriers). If you have a crowd, do this at each table and have them report back their top 3 to 6 solutions. At end, list only the ‘changes required’ – not the impediments.
3. **Hang the lists in the lunchroom.** Come 15 minutes early and we’ll put them up. Write them neatly on big paper (in the same order) to be hung across the front of the room (we’ll see where, maybe side, maybe front table) for the closing activity. (note, we may choose to write them on 8 ½ by 11 paper and show big on a projector, too, as needed).
4. **Present your group’s solutions at the lunch session.** We’ll have one or two people present- briefly – each session’ list. Then, the ‘open mike’ comment period becomes an ‘add to the list’ session. What did we miss? Do any of these ideas fit together? Invite participants to comment on how they might take the ideas home and apply them to a project or policy waiting on their desk. Add new suggestions to the lists at the front of the room.
5. **After the comment session, highlight the best ideas.** Ask people to consider which action items are most needed or most likely to succeed. Test to see how important each idea is by going down the list step-by-step, asking for a ‘voice vote’ on each one (ie: ‘give me some noise if you like it’). Think in terms of football pep rally for the bow-tie crowd. Mark popular items with stars, or circle or underline them, depending on volume.
6. **Add a thoughtful closure.** Ask a half-dozen folks to ‘testify’ about how they are committing to follow through on a particular part of the agenda. We’ll then turn it over to the panel to go into more detail about how they might implement some of the suggestions.
7. **Edit and publish your Action Agenda.** The list from the closing session is just raw material. Sort, edit & combine items, and use poetic license to come up with language that has some resonance. Ask attendees to send it out in their newsletters, post it on their websites – and have their organization, municipality, or company endorse and act on the Agenda. It might get some coverage from press attending the conference. Send everyone a copy. Make it happen!

Mixed Use Communities

Housing Action Agenda

The concept of mixed use communities goes beyond incorporating residential, retail and commercial properties. It implies developing neighborhoods and towns with walkable streets that provide easy access to services and amenities such as schools, libraries, parks, and shops.

Affordable housing is a vital component of every mixed use community. Allowing people to live in the same communities where they work and shop improves the quality of life, increases residents' sense of belonging, and reduces traffic congestion. Having employment, shops, and schools nearby significantly reduces commuting and transportation costs. Mixed use communities promote inclusion and diversity by incorporating housing for people of all income levels along with supportive housing for the elderly and people with special needs. Ultimately, mixed use communities foster a sense of connection that bolsters the health and vitality of a community and its residents.



Creating Successful Mixed Use Communities, held on March 18, 2003, provided a fertile ground for a wide-ranging group of participants to identify problems and develop creative, workable solutions to the most pressing housing and community development needs in our region. Realtors, developers, bankers, housing advocates, architects, planners and representatives of municipal, county and state government worked together to identify barriers that prevent building affordable mixed use communities and develop concrete solutions to overcome those barriers.

Participants created the Action Agenda by listing suggestions and concerns at each breakout session, and filtering them through a consensus process at the final session. Most suggestions were rooted in participant's knowledge of successful implementation elsewhere. Participants' suggestions generally fell into six categories: affordability, land use, public/private partnerships, transit-oriented development, diversity and inclusion, and education.



AFFORDABILITY

Participants agreed that mixed use development in the region should consider the diverse needs of the population and provide adequate affordable housing.

Mixed Income

Mixed use development in the region should include mixed income housing, providing adequate housing for low and very low income people.

- Current definitions of affordable housing units are still prohibitively high for many low income families. We may need a better definition of affordability (currently defined as a household spending less than 30% of their income on housing) to make sure that the needs of low and very low income residents are met, including the needs of people on fixed incomes and those at risk of becoming homeless.
- All new mixed use development should include provisions for low income people whether through incentives, greater cooperation between the public and private sector, regulation, zoning, and/or creative financing.

- In addition to providing affordable housing in mixed use development, it is important to develop mechanisms to ensure long-term affordability.

Mixed Housing Types

Mixed use communities should include a wide variety of housing types to address the needs of residents at all income levels, with particular emphasis on the needs of low income residents.

- A diversity of housing types should be offered to meet the diverse needs of the community. Housing types could include accessory units, multifamily units including duplexes and quadraplexes, small lots, condos, townhouses, and manufactured pre-fab homes.
- In order to prevent homelessness, a variety of housing types are needed including single room occupancy dwelling units and housing with appropriate supportive services.
- In addition to diverse housing types, changes to current zoning may be needed to allow for greater occupancy levels.
- Alternatives to single family detached homes will bring prices down and create more green space.
- Residents in the planning district have diverse needs and require a mix of affordable rental units as well as opportunities for home ownership. In order to meet the needs of low income people, it is necessary to increase the rental stock in the area and develop ordinances to ensure affordable units in any new developments.

LAND USE

Many participants suggested using land strategically to encourage compact development around existing village centers and preserve green space.



Compact Development

Participants suggested encouraging mixed use development around existing village centers and preserving open space as much as possible.

- Promote clustering around existing village centers to preserve open space.
- Increase density by looking toward infill of underutilized urban areas instead of encouraging sprawl.

Zoning

Develop creative zoning to support affordable mixed use development and meet the diverse needs of the community.

- Zoning should support mixed use, human scale development, and be by-right inclusive.
- Where appropriate in rural villages and traditional neighborhoods, eliminate set back requirements to allow street front development and minimize lot sizes to allow for more affordable units.
- Change current zoning to be descriptive, not prescriptive, with inclusive, not exclusive language.
- Create zoning to incorporate single room occupancy (SRO) dwelling units for people who are currently, or are at-risk of becoming, homeless.
- Develop a regional agreement on zoning and utilities.
- Change zoning to allow small businesses in residential areas to promote mixed use, walkable communities.

PUBLIC/PRIVATE PARTNERSHIPS

Participants offered many ways that the public and private sectors could work together to create affordable mixed use communities.

Incentives

Participants suggested a wide array of incentives to develop affordable mixed use projects.

- Offer tax incentives including enterprise zone tax credits, real estate tax credits for affordable accessory units, and other tax incentives.
- Create incentives for developers to increase density by encouraging affordable dwelling units (ADU).
- Encourage public investments in infrastructure that supports affordable mixed use development.
- Local municipalities can support affordable mixed use development by donating land.
- Provide developers with density bonuses.
- Streamline the permit processes for plans to develop affordable mixed use development.
- Encourage employer assisted financing such as setting up individual development accounts and promoting fund matching by the City, counties, or University to match their employees' funds.
- Use housing authorities to access or underwrite financing (i.e. bonds).
- Promote flexibility in development (i.e. planned unit developments, single room occupancy).
- Local governments should be able to require impact fees from developers for the cost of public infrastructure and facilities.

Cooperation

Participants agreed that greater cooperation among the University, the City of Charlottesville, the counties of Albemarle, Fluvanna, Greene, Nelson, and Louisa, and the private sector is necessary to create viable, sustainable mixed use communities.

- Foster better cooperation among the city, counties, and the University of Virginia.
- Bring the University to the table to address affordable housing in the region since over 12,000 students live off grounds. Explore public/private partnerships to better accommodate UVA's growth (such as UVA "buy-in" to mixed use developments for additional student housing).
- Build public/private coalitions to promote better and more flexible ordinances.

TRANSIT-ORIENTED DEVELOPMENT

A clear priority of many participants was to decrease traffic of single occupancy vehicles and encourage the use of public transportation.

Integrated regional transit

Many participants expressed interest in ways to decrease car traffic within Charlottesville by extending transit to rural and suburban areas.



- Provide greater public transportation from the outlying areas into Charlottesville. This will decrease the number of cars in the city, diminishing the need for more parking garages.
- Improve transportation systems within Charlottesville to decrease the number of students' cars.
- Ease the transportation cost burden for low income citizens in rural areas who commute to Charlottesville for jobs.

- In addition to the suggestions above, several participants mentioned the need to develop coordinated plans for the future transportation needs of the region.

Alternative transportation systems

Encourage alternate means of transportation within the City of Charlottesville as well as in surrounding rural counties.

- Mixed use development should focus on pedestrian oriented centers with compatible road design.
- Design should be pedestrian oriented and human scale.
- Encourage greater investment in community transit such as pedestrian walkways and rail.
- Seek a balanced use of automobiles including underground parking and putting parking lots behind buildings.

DIVERSITY and INCLUSION

Mixed use projects should promote diversity, include people of different income levels, integrate special needs populations, and improve access to services.

- Encourage co-location of elder-supportive housing with other community services such as day care centers and libraries.
- Change zoning to allow for supportive housing facilities by-right.
- Encourage diversity of housing types, people, and use of space.
- Support non-profit organizations that address the housing needs of special needs populations.
- Create model accessible homes and build retrofittably for people with physical disabilities.
- Encourage diversity in our communities through design standards.

EDUCATION and AWARENESS

Participants agreed that educating the development, investment, real estate, government and resident communities on the benefits of mixed use development was a top priority.



- Increase awareness among developers and real estate agents of affordable housing needs in mixed use development.
- Create and publicize model projects.
- Increase public awareness about the need for affordable housing.
- De-stigmatize affordable housing and break down myths about low income housing.
- Help homebuyers learn about creative financing options and develop reasonable expectations.
- Coordinate education and advocacy for under represented groups with particular housing needs.
- Provide financial skills, budgeting, savings, and homeownership education to adults and youth.
- Create a central information clearinghouse to provide information about financing, availability of housing, and services available.
- Make all outreach activities accessible to people with special needs.



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Public Involvement Best Practices: Linking Land Use & Transportation

Harrison B. Rue



Summary

This paper outlines effective practices for incorporating grassroots community-based planning techniques into the statutory transportation planning process, while developing new strategies for linking land use and transportation planning, re-engineering roadways to enhance safety and multi-modal mobility, and encouraging more compact development patterns. The basic components – inter-agency teams, facilitator training, community education, hands-on charrette-style workshops, engaging presentations, group workbooks, inspiring and buildable plans – have been developed over time by the Citizen Planner Institute, and tested in communities across the country.

Effective process does not replace governance and good business with anarchy.

- ❑ The people ‘own’ the process
- ❑ Designers do their work
- ❑ Developers or agencies ‘own’ the projects
- ❑ Elected decision-makers still make the tough decisions
- ❑ Most importantly, the plans get built.

Practice Development & Core Principles

These practices have been developed over the last fifteen years (working with firms like Dover Kohl, Duany Plater-Zyberk, Ramon Trias, Correa Valle Valle, Dan Burden, Daniel Williams), and tested in a wide variety of community and agency applications. The author founded the Citizen Planner Program at Miami-Dade Community College in 1995, to translate complex New Urbanist principles to average citizens and planning staff. The MacArthur Foundation’s Sustainable Everglades Initiative funded expansion of the program’s training workshops and community charrettes into South Florida, and required collaboration with a wide range of community and government groups. Florida Department of Community Affairs funded additional training workshops for communities and agencies across Florida. In 1996, the Citizen Planner Institute (CPI) was founded to carry this work on outside the community college system. US EPA provided funding to complete and publish the training handbook, *Real Towns: Making Your Neighborhood Work*, along with several training workshops in California.

During the early years of program development, Citizen Planner training typically lasted a month or more – four half-day sessions for agency staff, and four evening sessions for community groups. As the materials improved, and presentations were refined, this was compressed to a single training session (mornings for staff, evenings for citizens, and a walking audit in the afternoon) to prepare for a Saturday planning workshop.

Core Principles

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| <ul style="list-style-type: none"> ❑ Grassroots planning techniques applied to statutory agency policies & process ❑ Used across country, neighborhoods to regions, workshops for a dozen to 1,200 people ❑ Works for transportation, land use, housing, workforce, environment, economy – any topic, project, or agency ❑ Most effective when multiple topics, partners, and funding streams combined with new design solutions and built examples |
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After helping Walkable Communities kick off Honolulu’s Islandwide Traffic Calming Project in 1998, CPI was invited to stay and oversee public participation for Oahu Trans 2K, a Major Investment Study for a proposed Light Rail project. Because of an aggressive timetable – and ideas that were new to both the community and a very large project team – we tightened up the process significantly. This included: more efficient agency & leadership training, formalized facilitator rules (*a 2-page handout & 2-hour training*), turning public input into ‘data’ (*2,400 separate sortable comments entered into an Access database from Round 1 alone*), requiring agency & consultant participation (*over 100 staff & consultants trained from almost 20 firms and agencies*), all-out publicity and communications strategy, blueprint-sized group workbooks, and regular reports on the Action Agenda (*what ideas each agency had implemented since the last workshop*). The Oahu Trans 2K workshops – always an efficient 2-hour hands-on session – went through four rounds of nearly fifty workshops and over fifty focus groups in six months. Most significantly, the active public input led to actual changes in the project, which started as a Light Rail study and morphed into a Bus Rapid Transit project to meet community concerns over cost and maintaining clear views. In essence – if you’re going to seek public input, you have to follow through on what you’ve heard.



An effective process works as well in a minority neighborhood as it does at a USDOT Leadership Conference.

Although each project takes a slightly different approach, the most critical elements are common to all. Facilitator training for both agency staff and community leaders is a key predictor of success, since it essentially gives the process over to the community – although a strong moderator is always needed to stay on track. The RoadWork exercises (from *Real Towns*) and Walking Audits help participants to understand their own neighborhoods, while looking for areas where change is appropriate. Even where trained facilitators are plentiful, we practice an ‘open architecture’ process – by describing in the opening PowerPoint just what we’ll do that night, and then clearly laying out the ground rules before each group exercise.

Bricks and mud tend to be thrown by angry people when they have a big audience. While discussions with the entire group are good for initially laying issues on the table, and for taking questions and explaining details of a plan being presented at a later workshop, most creative work happens in small groups (eight to 10 people per table), typically using markers on large area maps. One classic and powerful tool is also the simplest way to start a group’s engines – one-on-ones. The audience is asked to divide into twos and share a key issue with each other, with one caveat – they each have to listen and report the other’s comment back to the group. Another simple trick, ‘post-it visions,’ starts with individual input and leads to a summary of what the group has in common, all in about ten minutes. Each person is given five post-it notes and a few minutes to write down five phrases that describe their long-term vision for the community. These are then self-sorted on the wall into topics that invariably demonstrate how much the group already holds in common. Another

way for the groups to prioritize issues before heading to the tables is listing all the problem areas and potential solutions (big paper, big print), then posting those lists on the wall for a ‘dot vote’ – which again demonstrates clear group preferences. Good process makes effective use of technology, especially clear and well-organized PowerPoint presentations to lay the groundwork and define options. A variety of image-rich toolbox solutions are presented, along with instructions for working together. These images are often available for viewing or comment on the website. Finally, the hallmark of an effective process is efficiency. While many of our community design workshops are an all-day Saturday event, most of the work on transportation projects discussed herein is accomplished in well-organized two-hour sessions.

Comprehensive approach relies on:

- 1) **Getting people to the table** – all-out PR and partnerships
 - a. Inter-agency teams, cross-program coordination
 - b. Work through community contacts
- 2) **Preparation & training**
 - a. Facilitator and staff training, community education
 - b. RoadWork & Walking Audits
 - c. Science/data/designs translated & presented clearly
- 3) **Well-designed process** – issues-oriented focus groups, individual exercises, and hands-on public workshops
 - a. Small groups, marking on maps, place based,
 - b. “Open architecture” process – clear directions & rules explained to all
- 4) **Comprehensive, exciting, visual plans** with innovative designs and local examples; cost-effective & buildable
- 5) **Action Agenda** to get buy-in and determine priorities
- 6) **Funding and implementation** of model projects

Case Studies

The United Jefferson Area Mobility Plan, or UnJAM 2025, is a regional long-range transportation plan linking transportation, land use, economy, and environment. It focuses on improving mobility, increasing real choices in travel modes, making the best use of our existing roadway investments, and targeting transportation investments to support smart land use decisions. Initiated in April 2002, UnJAM 2025 couples the MPO’s Charlottesville-Albemarle Regional Transportation Plan for the urban/suburban area with the Rural Area Transportation Plan for the surrounding four counties. The inter-jurisdictional planning effort is led by the TJPDC, with active participation from local, state, and federal agencies.



Groups marking up blueprint-sized UnJAM Round 2 Workbooks, determining policy and project priorities.

UnJAM executed an extensive public involvement campaign, focused on interactive, hands-on workshops, and taking a fresh look at transportation and land use options. Eight Round 1

and its related principles have become a household word with community members, local elected officials, agency staff, and area businesses.

UnJAM has wrapped around several related planning efforts. The Eastern Planning Initiative modeled changing how and where growth occurs, by building around historic town centers in walkable, village-scaled development, preserving forests and farmland, and saving up to \$500 million in transportation investment. The Hillsdale Drive Traffic Safety Study developed age-friendly roadway improvements. MPO Walkability Workshops increased awareness of pedestrian issues, and broadened the base of allies to include fire chiefs and disabilities activists. As an outgrowth of UnJAM, VDOT and local staff requested training from the MPO in roundabout modeling and design, and attended TJPDC's Mixed-Use Housing Conference. This led to the inter-agency 29H250 study focused on creating intersection improvements and completing the multimodal network to foster transit-oriented, mixed-use development along a typical suburban arterial strip.

Challenges

- ❑ Getting people to the table – especially at regional scale
- ❑ Coordinating public infrastructure & developers' investments with a long-range transportation plan
- ❑ Inter-jurisdictional cooperation & coordination
- ❑ Long-term action on implementation tools & funding

While there are significant challenges to wedding grassroots-style public participation to complex, traditionally regulation-laden transportation planning, the rewards are worth the effort. The biggest challenge is getting people to the table – from competing jurisdictions, agencies, funding sources, public and private developers – to the public at large. It is much easier to get 300 people to turn out after a fatal crash, or to oppose a specific highway, than it is to work together developing regional long-range plans. Similar challenges exist in getting on-going cooperation to coordinate development proposals with transportation improvements that (might) occur far in the future. While we have had strong participation from developers and builders in neighborhood-scaled community design workshops (often eager to incorporate their projects into the plans) it is much more difficult to coordinate major developers' investments with a long-range transportation plan. Creating a successful marriage between transportation and land use planning requires extensive community education, consensus, and long-term action on some of the potential implementation tools, such as: creating urban design guidelines, updating parking regulations & requirements, developing healthy streetscape standards, encouraging compact Transit-Oriented Development, adopting mixed-use zoning, amending building and rehab codes, and developing an integrated, multi-modal transportation network.

Key Considerations

- ❑ Effectiveness is multiplied by coordinating parallel efforts - across agencies, in the region and in localities, over time – wrapping related efforts in the 'brand name' – like Sustainable Everglades Initiative, Oahu Trans 2K or UnJAM
- ❑ Uses training, education and workshops (both public and staff) to introduce new design or policy solutions that can unblock agency resistance to change
- ❑ Facilitator & staff training is the key sparkplug - for smooth process, for PR and participation, and to lead to long-term implementation
- ❑ Facilitator ground rules make workshops smooth, efficient, and productive, while not forcing consensus

Strengths

Effective public involvement is rooted in hands-on community process and partnerships between local jurisdictions, state and federal agencies, transit providers, business groups, developers, regional organizations, and community activists. The comprehensive approach relies on 1) getting people to the table; 2) a well-designed process – including facilitator and staff training, issues-oriented focus groups, and hands-on public workshops; 3) comprehensive, exciting, visual plans with innovative designs and local examples; 4) an action plan to get buy-in and determine priorities, and 5) funding and implementation of model projects.

More people involved – public, business people, staff and agency leaders – helps a plan withstand the vagaries of short election cycles, staff turnover, and lengthy funding timelines. A comprehensive cross-program approach can solve more problems, attract varied funding sources and allies, and build a wider support base. By coordinating related efforts in one region over time, the effect of each plan or program is multiplied. Using an ‘open architecture’ process (explaining exactly how meetings will be run, with simple ground rules), coupled with extensive training, allows participants to apply the principles in other community exercises.



Getting community decision-makers involved in hands-on exercises and fieldwork – like this street capacity exercise – can multiply the effectiveness of workshops and training, while getting great PR for upcoming events.

An effective process must be simple enough to be replicable in other communities. The techniques, tools, and process used to develop UnJAM can be repeated anywhere, regardless of size, location, or sophistication. The Level of Quality Guidelines, Facilitator Toolbox, QuickPick Forms, PowerPoint presentations, and workbooks used in UnJAM 2025 are available at www.tjpc.org and could be tailored to fit any region.

Effective process does not replace governance and good business with anarchy. In a well-designed process: the people ‘own’ the process, the designers do their work, the developers or agencies ‘own’ the projects, the elected decision makers still make the tough decisions, and, most importantly, the plans get built.

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