



Establishing An Effective Local Economic Development Program

by Robert Bateman

OCTOBER 2003

Many municipalities have focused on their economic base as an important component of overall community development and well-being. Businesses, imported wealth, jobs and income are recognized as significant sources of support for other business and governmental services because of the cash flow and economic multipliers that they generate. Other cities and towns understand the value of a viable local economy but do not have the mechanism in place to enhance the opportunities for growth that they may inherently possess.

This paper may prove beneficial to both groups of communities. For those municipalities that do not have established economic

development programs, this compilation of information will assist them in getting a start. For those that have active programs, this outline will give them cause to evalu-

ate and make adjustments in their respective programs.

This design for economic development programming is a collection of proven techniques. The focus of this approach is a product of personal experiences in the management of state and municipal development offices.

1) Establishing the Preconditions—Your Infrastructure for Success

- Political support for your program is a necessary starting point. Local government officials play a significant role in the process. They must understand from the outset what the mission of your program is and what their role is likely to be. Endorsement of your efforts must also be garnered from business organizations. In addition, local community development groups should participate in the establishment and operation of your program. Their understanding of your goals and objectives for the local economy is a must from the beginning.

- The endorsement of the financial leaders of the community is a key ingredient to your program. Their assistance in providing much needed financial resources for development activities is an obvious precondition to launching your efforts. Without it, any undertaking is doomed to failure.

- A labor pool network should also be available at the outset. Without access to the labor market and qualified workers, businesses will find it difficult to grow their companies.

- A competitive tax structure should be in place as a precondition for your undertaking. Showing your existing companies and any prospects for location in your municipality that the taxes that are paid by businesses are fair and reasonable, is an important ingredient for starting an effective program.

2) Creating a Point of Contact within the Community and a Market Presence

- You must establish a base of operation within your municipality. You need an office, an address, telephone number, WEB address, etc. You must be in a position to meet local prospects. You must have the capability to communicate in a timely manner. The physical location of your base of operation could be in any one of several places, the city or town hall, the chamber of commerce office or through a non-profit development corporation. Your community will have to make this decision after weighing all of the local factors.

- Connecting with the regional and state economic development offices, and with statewide business and industry organizations, is the next critical step for your community. Many states have business development offices with regional locations that provide municipalities with assistance. These offices also offer information and technical assistance to existing and newly formed businesses. Very often leads for relocating businesses and start-up companies can be secured through these state offices.

... this compilation gives your city or town a plan and approach to work with.

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DIRECTOR'S NOTE

By the time this issue of the *Northern News* arrives in your mailbox, we will be deciding on whether we should have a new governor. It's amazing how this story has had worldwide appeal that has been created mostly from a well-know actor taking center stage. There are, of course, many others in this field that want to be governor —135 to be exact. Whether you believe in the recall or not, want a new governor or not, it's important to keep planning issues on the forefront and to be able to work with a governor who is interested in building better communities.

For those who attended the **California Chapter APA Conference** in beautiful Santa Barbara, I'm sure you enjoyed the scenery of the central California coast while being enlightened with the sessions and mobile workshops. Next year's state conference will be in Palm Springs hosted by the Inland Empire Section. The Northern Section won't be hosting a California Chapter APA Conference until 2009.

But we have our hands full, since our Section, along with the California Chapter's help, will be hosting the 2005 APA National Conference (as many of you know already). The Local Host Committee has been meeting monthly and we have some committees going strong while others are just getting started. The conference committees are fundraising, hospitality, merchandise/souvenirs, mobile workshops, portfolio, program, public relation, treasurer, and volunteers. Please note that all committee chairs and co-chairs will be selected before the end of this year. If you have a desire to help out in any capacity, it's not too late to join in! Please contact me and I'll get you involved!

We welcome two new Board members: **Christina Ratcliffe** will be our new Professional Development Director and **Joanna Gomes** will be our new Advertising Director. Christina's goals for the position include holding general information meetings, assisting with career advancement, AICP training, time management seminars, providing advanced planning degree information and general information to assist planners "in the trenches." If your agency or company seek to advertise in the *Northern News*, please contact Joanna. Finally, if you are motivated and would like to serve as the next Awards Coordinator, please contact me.

—Hing Wong



Call for Nominations

Elections will be held this November for the positions of Director Pro Tem and Treasurer of the Northern California Chapter of APA. These offices have a term of two years. Nominations for these two important positions may be sent to the Nominating Committee c/o awelsh@saratoga.ca.us or mailed to Nominating Committee c/o Ann Welsh, Community Development Department, 13777 Fruitvale Avenue, Saratoga, CA 95070.

Please submit name and position sought by October 15. A nominating petition which includes the candidate's name, address of membership, work or daytime telephone number, position being sought, and the signatures of five (5) section members.

NEWSLETTER INFORMATION

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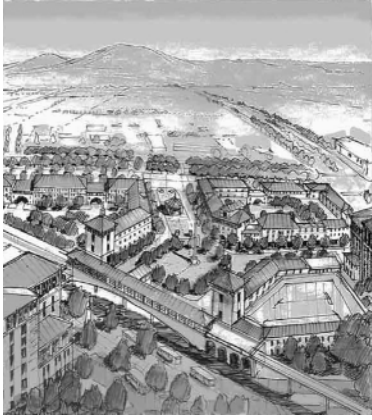
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The deadline for submitting materials for inclusion in the *Northern News* is the 16th day of the month prior to publication.





Pleasant Hill BART Conceptual Rendering

Charrettes for Positive Community Change

In 2001, an exciting change began to take place in the community surrounding the Pleasant Hill BART station in Contra Costa County, California. The Contra Costa County Board of Supervisors, the Contra Costa County Redevelopment Agency, BART, local residents, business leaders, activist groups, and area employees, along with developers and consultants got together to decide the fate of their community. They created a shared vision and developed detailed plans and codes to implement it.

How did they do this?

Over the course of six days in spring of 2001, dozens of possible ideas were discussed and synthesized into a community plan that addressed participants' concerns using a collaborative, holistic public planning process called a charrette. Following the charrette, the design team prepared codes to ensure that the designs created during the charrette would actually be implemented. In late 2002, the Board of Supervisors unanimously adopted the plan.

What's a charrette?

The term "charrette" is used with increasing frequency to refer to any type of community planning meeting that involves brainstorming or drawing. However, it is not a merely a day-long, flip-chart-type meeting to haggle over design issues that are then taken back to planning departments where decisions are made.

A charrette is distinguished from other meetings by its intense, collaborative nature. It is an accelerated planning process that brings all parties together in one place for four or more consecutive days to create feasible development plans. It gets all parties to the design tables and uses facilitated discussions to draw out the salient priority issues and gut-level desires of all constituents.

Charrettes don't deal with single development issues in isolation. They move all design and development issues along the same track to allow each issue to inform the decision-making for related issues. The charrette is also a democratic process in that all voices and viewpoints are considered. It involves all disciplines in an orchestrated series of "feedback loops" that chronicle decisions made along the way and provides a constant track record.

The charrette does not occur in isolation, but is part of a larger process called Dynamic Planning, which includes project set-up and plan implementation. The Charrette takes place between these two phases and acts as a catalyst to produce buildable designs.

Who are we?

The National Charrette Institute (NCI) is an IRS 501(c)(3) nonprofit educational institution. †NCI is the resource for Dynamic Planning, a holistic, collaborative planning process that harness the talents and energies of all interested parties to create and support a buildable plan.

What do we do?

We teach professionals and community leaders the art and science of Dynamic Planning. We also offer a certification program and provide on-the-job training and project-based technical assistance. To learn more about the Dynamic Planning and Charrette processes, please visit the National Charrette institute's website at www.charretteinstitute.org.



Economic Development ... *(continued from page 1)*

- Reach out and undertake systematic employer visits. The mission of these visits is to introduce your economic development program to the employer and to solicit from them what their needs are and what type of help they may require to grow their operation in your municipality. Usually a team approach is the best. Carefully select a team membership that includes persons from the business decision makers.

- In this age of electronic technology, a presence on the Internet is a must. Establishing a Web address with email capabilities will allow your community to communicate to public and private sectors.

3) Retention vs. Recruitment - Assessing Your Community's Opportunities

- Many economic development practitioners believe that retention of existing firms is most important. A bird-in-hand you know! Building upon your existing economic base makes great sense. In those municipalities that are extensively developed, retention activities are likely to be the only game in town. But bringing new businesses into your community will prove beneficial in the longer term by presumably adding jobs and generating new real estate tax collections. As a first step, a profile of your municipality's economic base must be created. The availability and the quantity of development resources, particularly land and buildings, will be your focus. Other factors that would have an influence would be any "Brownfield sites" and potential "economic conversions" existing in your city. Very often, these situations offer prospective sites for businesses.

- Once you understand the components of the local economic network, assessing the opportunities that you have for growth is next. Conducting a thorough assessment of your locality's opportunities and establishing a compilation of them, will determine the balance that is desirable between retention programming and activities directed toward recruitment. In this phase of work it may be helpful for your municipalities to seek out professional advice.

- Whatever the blend of emphasis in your services between retention and recruitment activities, the key is to seek out the customers, whether they be local firms desiring to do expansions or out-of town firms interested in a

new site of operation. Outreach and networking are essential at this program level. Generating leads and prospects for your program will probably be your biggest challenge. The competition for new businesses is fierce. Businesses, by their nature, will try to leverage the best deal that they possibly can for their firms. Economic development recruiters will pull out all of the stops to capture their investment and the beneficial spin-offs such as attractive new plants, jobs, income, new real estate taxes and the related economic multipliers. Your community's ability to prospect and identify leads will determine the bottom line success of your program. So it is very important that you establish and maintain a high visibility with the "leads" network and your local customers.

4) Developing a Database of Available Facilities and Sites

- When your city opens its doors to businesses, it must be fully prepared to respond to requests for information and support. One of your primary offerings ought to be an inventory of available facilities and sites that are zoned to accommodate business activity. Formulating a data sheet for each available property and compiling these data sheets into an easily accessible base will provide your community with the ability to be responsive to requests from businesses. Property data sheets should contain fundamental information about

(continued on next page)

Professional Notes

Pacific Municipal Consultants (PMC) announces the opening of its Oakland office. PMC is a fast-growing planning consultant firm exclusively serving government agencies. The Oakland office is our newest of seven locations from San Diego to Mt. Shasta, with Monterey, Davis, Chico and Rancho Cordova in between. We are excited about the opportunities this new location brings and look forward to developing long-term, relationships with government agencies in the Bay Area. Please come by and see us!

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Web Picks for the Month of October



Can I Vote?

This pamphlet prepared by the Fair Political Practices Commission provides an overview of public officials obligations under the Political Reform Acts—Conflict of Interest Rules. In very user-friendly format it answers common questions about whether there is a potential conflict of interest involved in one's vote. The pamphlet is in PDF format and can be downloaded and printed for distribution to Planning Commissioners, City Council members and other public officials. The web address is <http://www.fppc.ca.gov/PDF/booklet.pdf>

(Source: Kit Faubion, Northern Section, Legislative Director)

CALBIOTA

This site, **California Species Compendium**, is the first comprehensive database of all common and rare non-marine plants and vertebrate animals, and many invertebrates recorded from California.

Calbiota is intended to serve as a single source reference of the currently accepted scientific and common names, current state and federal endangered species status, and special species status for all upland and wetland plant and animal taxa in the state.

Calbiota also includes hundreds of ornamental plants found in horticultural settings. To learn more please visit <http://calbiota.com/>

(Source: Diane Jenkins, Inland Empire Section, Memo Newsletter, August 2003)

DESIGN, COMMUNITY & ENVIRONMENT in Berkeley, California has openings for three positions in planning and design:

- **Planner.** Responsibilities include research and writing for environmental review documents and comprehensive plans and proposal writing. Applicants should have a minimum of one year of CEQA and/or comprehensive planning experience or an advanced degree in planning with excellent references.
- **Urban Designer.** Responsibilities include drawing by hand and computer to support urban design, planning and design guideline projects. Applicants should have an undergraduate or graduate degree in architecture with an emphasis on urban design projects.
- **Associate: Environmental Planner and Project Manager.** Responsibilities include project management for environmental review documents and comprehensive plans, including client interface, subconsultant management and proposal writing. Applicants must have a minimum of two years project management experience in CEQA. Experience in comprehensive planning and/or business development would be helpful.

Salary commensurate with experience. Full benefits are included in the salary package. There is no relocation allowance for any of these positions. Email a resume and cover letter to nancy@dceplanning.com or fax to 510/848-4315. Please see our website for more information www.dceplanning.com.

**CITY OF MOUNTAIN VIEW
PRINCIPAL PLANNER**

Community Development Department

Interested in joining a team of planners with a national reputation for award winning planning? If your answer is yes, then we would like to talk with you. The City of Mountain View is seeking an innovative, experienced Principal Planner who will staff the Environmental Planning Commission and manage long range planning projects. Current projects include planning for mixed-use development on a 27-acre site and redevelopment of 10 acres of prime regional commercial space. The ideal candidate will have extensive experience in managing complex planning projects, environmental review, negotiations and presentations, and have strong leadership, problem solving, communication and writing skills. A degree in planning or a related field plus four years of professional planning experience, preferably in the public sector, is required. Salary for this position is \$ \$81,494-\$101,868 annually, with the ability to earn up to 20% more for exceptional performance. The salary includes the employee's 7% PERS contribution. The City also provides excellent benefits including PERS 2% at 55.

For more information about the City of Mountain View and the Community Development Department visit our web site at www.ci.mtnview.ca.us. To apply, please submit a City of Mountain View application form available from the City's Employee Services Department, together with a cover letter, current salary, resume and three work related references by 5:00 p.m. November 14, 2003. An assessment center and interviews will be held on December 12, 2003. For further information and application forms, contact the City of Mountain View, Employee Services Department, 500 Castro Street, PO Box 7540, Mountain View, CA 94039-7540, (650) 903-6309. EOE

Economic Development ... (from page 4)

each building or land plot. This tool will put your municipality in a competitive posture to capture expansion activity that may add new firms to your home base.

- Other facilities and sites that might provide development opportunities for your city and for newly formed or expanding firms are "Brownfield sites" or locations that might be prime for "economic conversion". Brownfield sites are sites that are considered to be environmentally contaminated. Their "clean-up", possibly with the support of state or federal governmental funding, could provide new homes for local businesses. "Economic conversions" are locations in the community where an upgrading of an existing underutilized building or site or the reuse of land would generate fresh economic activity. These locations could be existing commercial buildings with low levels of occupancy, abandoned public buildings or land, former state governmental facilities, old hospital buildings, antiquated industrial plants and the like. To many firms, these circumstances provide a desirable location and/or a low cost investment opportunity. By including "Brownfields" and "conversions" in your database of available sites your municipality is broadening its ability to attract new business investment.

5) Services, Technical Assistance and Support for Companies

- Providing information to businesses about the various sources of financing, private and governmental, is a service that your municipality should offer. A survey of banking institutions serving your area and of state and federal financing agencies can be conducted with relative ease. Using your municipality as a marketing mechanism is a desirable tool from their perspective. A catalogue of this data will prove useful to your city or town and to the businesses seeking financial support for their activities.
- Another beneficial service that your community can deliver to firms is assisting them through the state and local licensing and permitting processes. In this day and age of government regulation, this can prove to be a very valuable service. Pointing managers in the right direction and helping them to acquire the appropriate and necessary licenses and permits for their operations is paramount. Offering assistance to firms in this arena could make or break a deal. Some communities have employed a "permit manager" to track and coordinate local permitting.
- The compilation of a compendium of existing federal, state, regional and other local programs and technical assistance that might serve the needs of business is useful to managers. Principal sources of this type of information are often the state business development office, the regional planning office and the local chamber of commerce. Developing a working relationship with these business assistance providers will serve your program.

- As mentioned at the outset of this paper, taxation issues on *(continued on next page)*

Economic Development ... (continued from page 5)

many occasions become the focus of businesses. Having information available on your municipality's taxation programs, its assessment practices, local tax policies, the abatement processes and state and regional comparative data will give your program the ability to respond to related questions. Showing businesses that they are getting value for their tax dollars paid could give your community a perceived competitive advantage.

- Linking your program to the labor network in your region will give your municipality the ability to assist businesses to secure quality employees. Federal and/or state funded training and job matching agencies are commonplace. Their services are geared to deliver supportive activities to firms. Working with them to establish a presence in your municipality is an important component. So seek out the private industry council or the regional employment board and let them know that your city or town is plugged into the economic development matrix.
- Once your program is up and running, it may be advisable for your municipality to create a mechanism to bring government and business leaders together on a systematic basis to deal with matters of common interest and concern. An economic development committee and/or a set of working task forces can prove invaluable to both parties because they would provide opportunities for discussion and action on a variety of matters that directly bear upon the local economy. Substantive agenda items are the key to making this type of a process successful.

6) Bringing the Components of Your Program Together

As you can readily see, there is nothing magical about establishing a local economic development program. All of the components for creating and sustaining a successful effort are known. What is required is coordination, cooperation, communication and hard work on the part of your community's leaders.

This paper contains the recipe to get you started, or to fine-tune your present program. It is by no means intended to be all encompassing. Many other strategies can be employed to retain firms and to attract others to your community. However, this compilation gives your city or town a plan and approach to work with.

Committing time to the organization of a local task force; and perhaps dedicating some funding for the recruitment of professional assistance and/or for consulting services to assist your initiative will get you moving in the right direction!

About The Author: Robert Bateman served as the Commissioner of the Department of Community Affairs and as Assistant Secretary of the Executive Office of Communities and Development of the Commonwealth of Massachusetts from 1976 through 1979. He was the Executive Director of the Office of Economic and Industrial Development of the City of Holyoke, Massachusetts for the 20-year period ending in 2000. His formal training is in economics and urban and regional development.

This article is reprinted with permission from the Summer 2003 issue of *News & Views*, the newsletter of the Economic Development Division of APA. To join this Division see the membership form at <http://www.planning.org/joinapa/pdf/memberform.pdf>.

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NORTHERN SECTION CALENDAR

October

- 9–10** National Charrette Institute - San Diego
- 10–17** NCCAPA's Fall Trip to Cuba! (anderjenn@attbi.com for details)
- 21–23** Biennial State of the Estuary Conference, Oakland
Oakland Museum (call 510-622-2465 for details)
- 21** Implementing Environmental Justice: A Planning Policy Forum,
Berkeley Marina Doubletree, 9:00 a.m.–5:00 p.m.
(510)-548-7920
- 24** ABAG Fall General Assembly: Building a New Model of
Comprehensive Regional Planning & Governance, 8:00 a.m.
Hyatt Regency at Embarcadero, San Francisco
- 27–29** Brownfields Conference, Portland
(see www.norcalapa.org for details)

OCTOBER						
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Planning and the Black Community Conference

The Planning and the Black Community Division of the American Planning Association (PBCD) held the first PBCD conference in Oakland, California. The conference took place from August 7th through 10th, 2003. The conference involved planners from throughout the United States, focusing on a variety of urban planning topics and their impact on African American and other communities of color.

The conference featured an evening welcoming reception on Thursday, August 7th hosted by Oakland Vice Mayor Nancy Nadel and attended by ABAG representatives Henry Gardner and Gerry Raycraft. On Friday, August 8th, the conference opened with a plenary session and a keynote address by Dr. Robert Catlin, FAICP, Professor of Urban Planning and Public Policy at Rutgers University. This session was followed by breakout panel discussions on Transportation and Building Community Capital. At lunch, a presentation on city planning in Oakland was made by Leslie Gould, Planning Director for the City of Oakland, California. Dr. Joe Marshall, Executive Director of the Omega Boys Club also spoke on how planners can link their practice to working with disadvantaged communities. In the afternoon, a special plenary session was held focusing on the topics of the Prison Industrial Complex and the how planners should respond to Environmental Justice concerns. Friday evening closed with the PBCD Recognition Dinner, with Angela Glover Blackwell, President of PolicyLink giving the keynote address and Dr. Robert Catlin received the Division's Lifetime Achievement Award.

On Saturday, August 9th, PBCD held a Division business meeting and conference attendees spent the afternoon on mobile workshops in Oakland and San Francisco. The Oakland workshop focused on Housing and Transit Oriented Development (TOD). This workshop included site visits to the Fruitvale BART transit village and the proposed transit village sites at the Coliseum and West Oakland BART stations. Other affordable housing projects in the Fruitvale area, including the award-winning Hismen Hin-Nu Terrace and Jingtowntown Homes developments were also featured as part of the workshop. The San Francisco workshop focused on community development and light rail, focusing on the San Francisco MUNI Third Street Light Rail Corridor, Phase I and II projects. Representatives from MUNI, the San Francisco Redevelopment Agency, the Bayview /Hunters Point Project Area Committee and Parsons Brinckerhoff participated in the mobile workshop.

A number of organizations at the local and national level worked together to sponsor the 2003 PBCD Conference. Financial support was provided by the American Planning Association, Parsons Brinckerhoff, Bay Area Economics, Haight Street Mortgage, Michael Pyatok, FAIA and J. Kelley Terry, AICP.

The conference was a great success and has motivated conference attendees to continue to work towards ensuring that all communities in which planners serve are active participants in the planning process.

*Conference report by: F. Kenya Wheeler,
Transportation Planner, Parsons, Brinckerhoff,
Quade & Douglass, Inc.*