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SEP 13 1985

DUNCAN & JONES

Recast the General Plan as a Strategic Plan.

If it works for business, why not for planning?

by Ted Kreines; AICP

The following article is one of sixteen brief planning essays in a collection entitled *At the Crossroads: The Future of General Planning in California*, published this June by *The California Planning Roundtable*. *Northern News* will feature a series of articles from this publication over the next several issues. Copies of the complete collection are available from co-editor Ted Kreines, 58 Paseo Mirasol, Tiburon 94920; 415/435-9214.

Corporations use strategic planning to deal with rapid change and complex issues. If it works for business, it may be just what California planning needs.

The starting point for strategic planning is asking "where are we today," much as CEQA requires planners to establish an "environmental setting" before talking about the future. But unlike EIRs, strategic planning focuses on identified problems, not a checklist of mandatory considerations. At first glance, this approach may seem similar to that of dividing a General Plan into elements. But there is an important difference—strategic planning divides issues into external factors that are beyond the planner's ability to control, and internal factors that the plan may indeed influence.

This is the first discipline of strategic planning: to limit analysis to issues the jurisdiction can affect. If planners followed this maxim, General Plans would be more realistic, focus on "do-able" tasks, concentrate on the short term, and abandon "wish lists."

To consider how a strategic plan would differ from a General Plan in treatment of issues, we might use the example of jobs/housing balance. Though this concept has long been a central theme of city planning, nowhere is this objective spelled out in the state mandate to

plan. To deal with jobs/housing balance, the General Plan would have to include elaborate statements in both the housing and land use elements. But most general Plans neglect to address the issue in the circulation element—the plan component that is probably most fundamentally affected by the question of jobs/housing balance.

Why does the General Plan fall short in dealing with such an issue? For one thing, the General Plan

continued on page 2

AB 2038 Analyzed

Panel on Planning Legislation Slated

Sande George, Cal Chapter's legislative representative, will discuss both recent and prospective planning legislation on Thursday evening, September 26, at the UC Berkeley Faculty Club. Joining the discussion panel will be **Michael Fischer**, recent executive director of the Coastal Commission, and Novato Community Development Director **Walter Monasch** who recently led several planning directors from Marin County to Sacramento to discuss issues with legislators and agency officials. The program will focus on ways that Northern Section planners can contribute to the Chapter's legislative program, and what lies ahead in planning legislation in the wake of AB 2038 (the general plan revision bill sponsored by APA).

Wine and hors d'oeuvres are planned for the 6:30 to 9:30 p.m. event. Attendance for this program will be limited, and your reservation form must be received by Monday, September 23. Cost will be \$6 for APA members, \$7 for non-members. The Faculty Club is located near the southeast corner of the UC Berkeley campus, near Gayley and Bancroft Way. Auto parking is available on the lot immediately between Cowell Hospital and Boalt Hall off Gayley near the football stadium, and transit users can take either the Humphrey Go Bart or AC Transit Bus #58 from the Berkeley BART station. For further information call **Matthew Le Grant**, day or evening, at 415/843-3766.

R E S E R V E

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Enclosed is a check for \$ _____,
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Strategic Plan

continued

mandate is disjointed. Requirements appear in various codes and many, including jobs/housing balance, are not properly indexed. The mandate also establishes a long laundry list of concerns ranging from scenic highways to sensitive receptors. No wonder plans are often vague and unfocused. The documents are prepared primarily to satisfy the state mandate and, as a result, generally command little respect within the jurisdictions they treat.

A strategic plan would attack the problem of jobs/housing balance in a much different way. It would first analyze external factors, assessing the economic forces affecting location of employment and housing. Rather than trying to change those dynamics, it would document those trends already in place.

The next focus would be on internal factors, and here there is much the community can do. The plan would recognize that transportation is one way to address jobs/housing balance, identify the transportation market and its sectors, define specific goals (such as increasing the "market share" of commuters using carpools), and determine ways of meeting those goals. It could also identify ways to work with the private sector in attracting desirable kinds of employment activity.

How effective would such a strategic plan be? Its performance could be measured by comparing peak-hour traffic before and after implementation of the plan, tracking transportation modes used by commuters to and from the jurisdiction, and comparing the actual supply and cost of new housing units or the number of jobs created with those targets identified in the plan. If the strategic plan doesn't work, it can be redesigned and tried again.

Because strategic planning is market-oriented, it is sometimes seen as an insensitive, blindly aggressive approach to problem solving. But in fact, it may be more sen-

CALENDAR

Date	Program	Sponsor/Location	Info Phone #
Sep 19	Professional Management Seminar	NAHRO San Jose	202/333-2020
Sep 26	Cal Chapter's Legislative Program <i>Sande George</i>	Northern Section APA UC Berkeley Faculty Club	415/843-3766
Oct 4	Exactions & Dedications <i>Dan Curtin</i>	UC Berkeley Extension San Francisco	415/642-1061
Oct 4	Land Development Partnerships	UC Berkeley Extension San Francisco	415/642-4231
Oct 4	Budget-Building Strategies	Western Governmental Research Assn. Holiday Inn, Belmont	213/498-5419
Oct 4	Tour of Residences Designed by Women Architects	Organization of Women Architects Marin, Napa Valley	415/550-6051
Oct 17	Urban Design of Bay Area Cities <i>David Miller</i>	Northern Section APA San Francisco	415/349-1200
Oct 18-19	Special Assessments	UC Berkeley Extension UC Berkeley	415/642-4251
Oct 26	Planning Commissioners' Institute <i>Curtin</i>	UC Berkeley Extension San Francisco	415/642-1061
Oct 27-29	Fifth Annual Zoning Institute	APA National San Francisco	312/955-9100
Nov 14	Development Agreements Seminar <i>Fred Etzel</i>	Northern Section APA San Mateo City Hall	415/392-4600
Nov 22	Planning-Zoning Clinic <i>Curtin</i>	UC Berkeley Extension UC Davis	415/642-1061

To announce events of planning interest for Northern News CALENDAR, please contact

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sitive to community conditions than General Plans that try to be all things to all people. Revamping the General Plan based on a private-sector strategic planning model would make public planning a more pro-active and positive force than it currently is in most communities.

Ted Kreines is president of Kreines & Kreines, planning consultants serving both the private and public sectors, with offices in Tiburon, Danville, and Honolulu.

JOBS IN PLANNING

To place a listing in Jobs in Planning, please contact the editorial office: 415/845-7549.

CITY PLANNER - City of El Monte, CA (Salary: \$31,056 - \$37,752 annually, plus City-paid PERS and Mid-Management benefit package.) Bachelor's degree with major emphasis in urban planning or closely related field with four years progressively responsible management experience in municipal planning. APPLY BY: September 27, 1985. APPLY AT: City of El Monte, Personnel Department, 11333 Valley Blvd., El Monte, CA 91734; 818/575-2037. EOE/AA.

ASSOCIATE PLANNER - City of Lodi, CA - (Salary: \$2,064 - \$2,509/mo., City-paid PERS and management benefits package.) Performs professional work in the field of current planning, advanced planning, environmental analysis, and economic development. Maintains general plan and assists in the administration of the City's zoning ordinance. B.A. degree in city or regional planning or related field and three years progressively responsible experience. APPLY BY: September 20, 1985. APPLY AT: Personnel Department, 221 West Pine Street, Lodi, CA 95240; 209/333-6704. EOE/M/F/H.

ASSISTANT PLANNER - City of Manteca, CA - (Salary: \$1,806-\$2,195/mo., plus 7% PERS paid by the City.) Equivalent to graduation from an accredited four year college or university with a major in planning or a closely related field supplemented by one year of experience in municipal or regional planning. APPLY BY: September 30, 1985. APPLY AT: Personnel Department, 1001 W. Center Street, Manteca, CA 95336; 209/239-9511, ext. 284. AA/EOE.

EXECUTIVE DIRECTOR - Sonoma County Community Development Commission - (Salary: \$39,428 - \$48,384). Plans, organizes, directs and coordinates all programs and operations of the Community Development Commission to include block grants, homeowner loans, revenue bonds, redevelopment, Section 8, density bonus and mobile home rent review; provides and directs staff services to commissioners and advisory committees; and performs related duties as required. Submit formal application to Sonoma County Personnel Dept., 2550 Ventura Ave., Santa Rosa, CA 94501; 707/527-2331. AA/EOE.

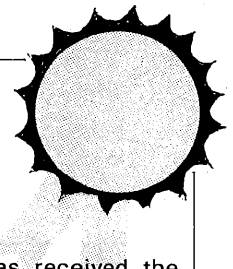
TRANSPORTATION PLANNING MANAGER - County of Alameda Public Works Agency, Hayward, CA - (Salary: Open, depending upon qualifications.) Newly-created management level position responsible for a dynamic transportation planning program in a high-growth environment including the provision of significant leadership in the coordination of transportation project and master planning, funding, construction, and monitoring activities. Requires college degree or equivalent and significant transportation planning and project management experience. APPLY BY: September 20, 1985. Submit resume (including work-related references and current salary) to: RALPH ANDERSEN & ASSOCIATES, Management Consultants, 1446 Ethan Way, Suite 101, Sacramento, CA 95825; 916/929-5575.

REDEVELOPMENT SPECIALIST - City of Brea, CA - (Salary: \$2,214 - \$2,841/mo.) The City of Brea, located in northern Orange County, seeks a Redevelopment Specialist to perform a wide variety of duties in the preparation and implementation of the City's Redevelopment, Economic Development and Housing Rehabilitation programs. Candidates for this position should have a Bachelor's degree in public administration, social science, economics, planning or related field, and two years of progressively responsible experience. City applications and supplemental questionnaires must be received by Thursday, September 26, 1985, 4:00 p.m. For information and applications, call or write: City of Brea, Personnel Department, Number One Civic Center Circle, Brea, CA 92621; 714/990-7715.

PLANNER.—Naphtali H. Knox & Associates, Inc., Palo Alto. Salary: \$23,000 to \$25,000. Opening for an exuberant, hard-working planner. Requires a planning or related degree and at least two years of experience in urban economics or urban design. A small, successful urban planning firm, Knox & Associates handles a wide range of projects for both public and private clients. Send resume, salary history, and date of availability to Naphtali H. Knox & Associates, 677 High Street, Palo Alto, CA 94301.

SUBSCRIPTIONS to *Northern News* are available to non-APA members and include *Jobs in Planning* listings. The rate is \$10/year.

CCAPA AWARD



Northern News has received the 1985 California Chapter Award for Planning Media, presented at the annual conference in San Luis Obispo by State Awards Coordinator Tracy Susman.

As editors we appreciate the contributions of all Section members who have provided material and support to the newsletter, and we are pleased for the recognition this award brings to Northern Section as a whole.
—Eds.

AICP

CONGRATULATIONS! to those Section members who were recently awarded membership in the American Institute of Certified Planners. These new AICP members include:

Noel Ameele
Dena Balzer
Robert Bluhm
John Day
Bob Forsyth
Peter Hartman
Gil Kelley
Peter Larko
Matt Le Grant
Marti Noel
Bradley Pearson
Trudi Ryan
Bob Vasquez

Call for volunteers: Volunteers are needed to work on an AICP exam preparation manual. Publications currently available in this area are woefully inadequate and not at all reflective of what has in recent years become an increasingly difficult exam. The goal is to prepare a manual which would be suitable for national distribution, with any income earned dedicated to supporting Section activities. Volunteers should call **Fred Etzel**, Section AICP Coordinator, at 392-4600.

Summer School '85

The Annual Conference of the California Chapter of the American Planning Association

URB CANE



Thursday afternoon, August 22, Southbound Highway 101 between San Jose and SLO: Carefuls of Northern Section planners are whizzing south for this year's planning conference . . . As we descend into SLO town, nestled in a warm valley between extinct volcanoes, we realize the true meaning of well-defined urban form . . . Arriving back to school on the beautiful Cal Poly campus, we self-consciously enter the dorms wondering where our younger days went . . . Shuttle busses carry us to the first night's reception at the City's conference facility, a lovely restored Victorian house that would rival San Francisco's best . . . A big banner stretches across the street welcoming the planners . . . We are here!



Friday, August 23 . . . Planners awake to find their conference attracts twice as many as expected . . . The Central Coast host committee runs around nervously while few planners grumble about the overflow rooms . . . It is just too idyllic, the weather too perfect to be really upset . . . The keynote luncheon has poetry and pom-poms: **Allan Jacobs** reciting poetry about the city (NYC) and some cheerleaders drafted to give us a planning cheer, . . . **Kevin Lynch's** taped interview is the big draw at the video festival . . . My friends are at mobile workshops for space shuttles and central coast wineries; I'm sure there is a connection to planning somewhere . . .



Saturday, August 24 . . . Workshops are less crowded as larger rooms are found and planners ditch Summer School for the beaches, hills, and countryside . . . I get my commemorative T-shirt as the price drops a buck . . . Overheard at the registration desk: "I'm sorry but you can't register; we are filled up" to a befuddled planner who whines "But I just flew up from L.A.!" . . . The Santa Maria BBQ complete with western band next to the Ag unit . . . Now you know why they call it Cow Poly . . . A late night dorm lounge discussion led by Cal Chapter president **Frank Wein** and Section Director **Steve Orlick** on the pressing planning question: "What are the ten best movies of all time?" . . .



Sunday Morning, August 25 . . . Cal Poly SLO planning grads gather to reminisce and pose for pictures . . . Nostalgia flows and networking is transcended by renewed friendships . . . Leaving town makes one viewing the fairytale campus and village-like setting not dismiss lightly the Shangri-la luis-obispo nickname.

—Matt LeGrant

Section Director's Report

It was good seeing so many Northern Section members at the 1985 Cal Chapter Conference in San Luis Obispo. For the second consecutive year attendance records were broken, and by all measures, the conference hosted by the Central Coast Section was a big success. Excellent educational "classes," lively receptions, informative and enjoyable mobile workshops, well-orchestrated awards luncheon, fine planning films program, meeting many friends and acquaintances, and homey and companionable dorm living for many of us made for the type of experience that recharged batteries and reminded us how fortunate we all are to be planners in California. Our sincerest appreciation for the dedicated hard work of the Conference Committee, especially **Norma Dengler, Skye Fleming, and Bill Howard.**

The "Back to School" theme of the conference served as the focus for numerous skills-oriented "classes." I attended three particularly educational sessions entitled, "Entrepreneurial Management," "Essential Planning Directorship," and "How to Deal with the Public." Other classes receiving positive reviews were "Technical Writing for Planners" and the series on use of computers taught by Steve French.

Continuing Education Credit Established

As Northern Section's representative on the Cal Chapter Board, I attended several meetings. Perhaps the most significant positive step taken by the Board was the establishment of a program to recognize the continuing education accomplishments of members (my original proposal). In essence, the program will work like this: Each section will identify continuing education activities (Section programs, University

short courses, etc.) which are appropriate for continuing education units (1 per hour). A voucher will be issued to each attendee of each program indicating the name of the program, how many units it was worth, etc. At the end of the year, all vouchers may be submitted to the Cal Chapter Vice President for Professional Development, who will issue a certificate in recognition of the planner's *voluntary* effort of professional development. The details of this program are now being developed, and the Board voted to implement it in the 1986 calendar year. It is hoped that this will become a model program for the rest of the country, and I am really excited by the potential value of this program to our members.

Chapter-only Membership Debated

The other noteworthy action taken by the Board concerned "Chapter-only Membership." The Board previously voted overwhelmingly to place before the Chapter membership this fall a by-laws amendment to permit establishment of a Chapter-only membership option. (One could join Cal Chapter, APA, for less dues, *without joining National APA.*) This option is presently allowed by National APA by-laws, but the Chapter Board in the past has not chosen to pursue it. The major impetus for the Chapter-only option was the recent dues increase from National and the change in the formula by which National rebates money to the Chapters (and, ultimately, to the Sections such as ours). The effect of these actions by National, in essence, is to unfairly treat California Chapter and a few others who have higher salaries than much of the rest of the country. (Please refer to Frank Wein's column in recent *California Planner* issues for a more complete explanation.) Members of

Cal Chapter are essentially paying higher dues to disproportionately make up a \$130,000 deficit at National and to support the programs of other smaller Chapters. The result also will be less money for the Chapter and Northern Section to provide the types of services which most directly benefit our members. The Board felt that allowing members the option of Chapter-only membership for lower dues might keep more California professional planners involved and informed. The financial advantage of this to the Chapter would be substantial.

National APA President Dan Lauber's insensitive responses to questions in meetings with the Cal Chapter Board in San Luis Obispo had the negative effect of creating a "we-they" split which none of us wanted or anticipated. What basically seems to exist is a philosophical disagreement between the Chicago-centralized National APA organization and the Chapter Presidents/Section Directors who favor decentralized provision of member services. California Chapter's and Northern Section's ability to provide even current services is seriously threatened by recent actions of APA National. Your Section and Chapter Boards will be providing you with more information on this matter before the upcoming elections this fall.

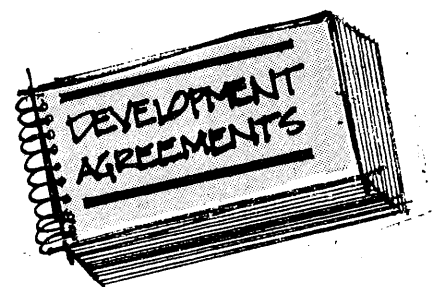
Political jousting aside, the Cal Chapter Conference in San Luis Obispo was, for me, an upbeat and positive experience. I especially enjoyed seeing all my former planning students and meeting many Northern Section members for the first time. Next year's Cal Chapter Conference in Yosemite in early November looks like it will be another opportunity for professional development in a great location. Make mental plans now!

Development Agreements Seminar Set for San Mateo

Development agreements, a relatively new creation of California law, allow local governments to agree to "freeze" the land use regulations applicable to a particular development project in return for various concessions from the developer. The theory is that developers will be willing to concede much more in the way of public improvements when they have a binding assurance that the regulations in effect at the time they make such concessions will not change. Many planners are staunch supporters of development agreements, while others believe that local governments, through aggressive negotiations, can obtain the same degree of developer concessions without contracting away their right to change the land use regulations. No matter what your opinion on this issue, if you are involved in local government planning you will be required to address it by developers in your community who increasingly are seeking to enter into such agreements.

Both sides of this and other practical issues raised by development agreements will be addressed by a panel of experts at a Thursday evening seminar sponsored by Northern Section on November 14, 1985 at the San Mateo City Hall, 330 West 20th Avenue., at 7:30 P.M. The format of the seminar will be a panel discussion of selected issue, followed by a question and answer

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Is our net really working?

Dave Miller

When asked to run for Northern Section Director Pro Tem, I reflected on the eleven years or so that I've been a member of APA, and the benefit that other professionals have afforded me through their PAS reports, *Planning* magazine articles, pieces in *California Planner* and *Northern News*, and items in other APA publications. Enough! I was convicted of professional leeching. It was now time to offer *my* time, effort and ideas into the APA organization, to pay back some of the non-monetary dues.

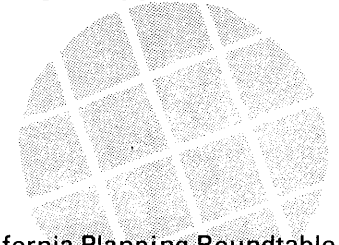
Unfortunately, I am afraid that most of us are suffering from an acute case of professional lethargy. To be sure we've lost political support for planning programs at the state and federal levels, and with that we've lost some of the critical networking entities such as the State Office of Planning and Research under the Brown administration, which provided statewide coordination and technical assistance to local governments. The problem is that there is an inadequate information network in Northern California today to serve our professional interests.

But I believe that there is great potential for networking, much to be shared and learned from the successes and failures of current planning programs and specific projects in Bay Area communities. Our local resources are some of the best in the state, and there's no reason why we can't generate increased enthusiasm in our profession and its accomplishments locally. As planners, this networking is valuable in two respects: we all need a little of that ol' time planning revival every once in a while to keep the spirit; and we need an occasional antidote for provincial planning myopia.

I'd like to hear from Northern Section planners as to what kind of sharing of professional experiences would be useful. Suggestions for topics, format and speakers are welcome. I can be contacted at 415/349-1200.

Providing vision and direction for long-range societal needs is our principal worth to society as planners, a task that cannot be accomplished without networking.

What is the California Planning Roundtable?



The California Planning Roundtable is an organization of experienced planning professionals who are members of APA. Membership is balanced between the public and private sectors, and between Northern and Southern California.

The mission of the Roundtable is to promote creativity and excellence in planning by providing leadership in addressing important, unresolved planning issues in California.

Northern Section members currently serving on the Roundtable include: **Bob Harris, Donald De La Pena, Bradley Inman, Ted Kreines, William Powers, and Myrna Valdez.**

N O R T H E R N N E W S

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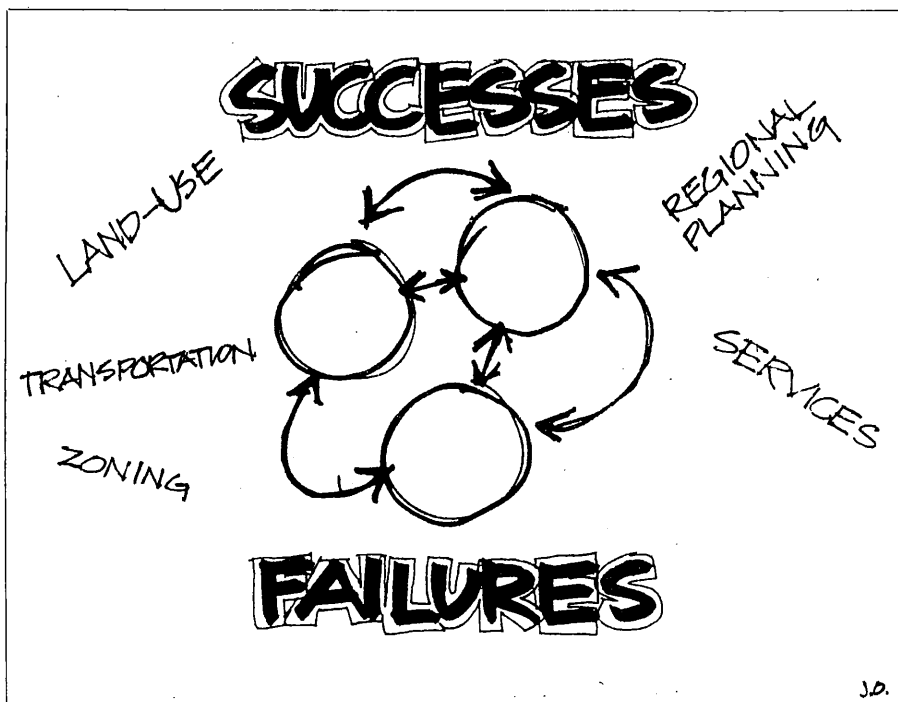
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JAN/FEB	Dec. 30	January 10
MAR/APR	March 1	March 14
MAY	April 26	May 6
JUNE	May 31	June 10
JUL/AUG	July 5	July 15
SEPT	August 30	Sept. 9
OCT	Sept. 27	October 7
NOV/DEC	Nov. 1	Nov. 12

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Northern NewsMAKERS

From the City of Santa Clara: **Art Henriques** has been promoted to Senior Planner and **Doug Handerson** to Associate Planner . . . **Erwin Williams** has opened a firm in San Rafael, providing services in master planning, development programming, and project evaluation and feasibility . . . **Brian Swift**, assistant city attorney of Pleasanton, has been named its new planning director . . . **Richard G. Arjo, AICP**, a former Senior Planner in Monterey County is now principal of Community Planning Consultants of Santa Cruz. . . .

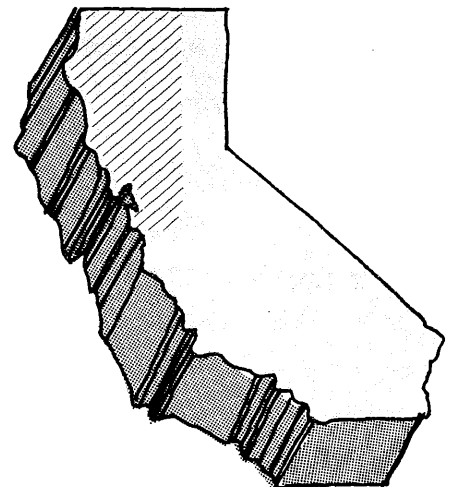
Agreements

continued

period and general discussion with the audience. This format is intended to maximize the opportunity of those attending to have their questions answered by the experts.

If you plan on attending the seminar, you are encouraged to call Fred Etzel, seminar coordinator, at (415) 392-4600 with issues/questions you would like to see addressed in the seminar.

NORTHERN SECTION



An idea? A suggestion? An observation? An article?

This is *your* newsletter: a fount of knowledge; a forum for opinions; a chance to see your name in print. Whether it's an item for **UPDATE**, **NewsMAKERS**, the **CALENDAR**, an article of general planning interest, or a letter to the editor, send it in! (The next copy deadline is September 27.)

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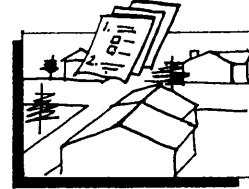
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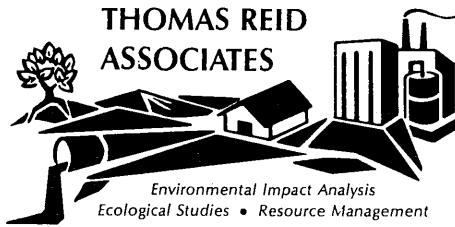
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