



Northern News

NORTHERN SECTION, CALIFORNIA CHAPTER, AMERICAN PLANNING ASSOCIATION

Sales Tax Leakage

by John Rau

Retail sales leakage (and hence sales tax leakage) occurs because residents of a city make retail expenditures in another city other than the one in which they reside. This is due to any one of a number of possible reasons including situations where people spend money in a city in which they work which need not be where they live, people going to other cities to shop because of the attraction of large social or commercial centers (such as regional malls or an auto center), people not spending money in the city in which they reside because it provides

limited commercial retail shopping places, etc. The effect of this “daytime population” can be dramatic. For example, Emeryville has a City-

estimated daytime population in excess of 20,000 persons versus a nighttime population on the order 7,000.

It is difficult to measure this phenomenon precisely. However, the generally accepted method used by economists is based on a per capita type of analysis, as follows. In this context, “retail sales leakage” is defined as the difference between the total county experience, on a per capita basis, and the local city experience, on a per capita basis, for a particular taxable retail sales category.

For example, if the total county retail sales experience was \$50 per capita and for the same retail sales category the local city experience was \$40 per capita, then the difference of \$10 per capita would represent the leakage from the city or 20% of what should have been captured based on the total county experience. On the other hand, if the local city experience was \$60 per capita, then this would imply that the city experience was better than what it should be based on the total county experience; hence, in this case,

there would be no leakage and an implied “capture” of sales from outside the city.

Taxable sales data by county and city in California is provided both quarterly and annually by the State Board of Equalization in the following categories: (1) Retail Stores-Apparel Stores, General Merchandise Stores, Food Stores, Eating and Drinking Places, Home Furnishings and Appliances, Building Materials and Farm Implements, Auto Dealers and Auto Supplies, Service Stations and Other Retail Stores; (2) Non-Retail-Business and Personal Services, Manufacturing, Contracting, Wholesaling, and Other. While some cities do not have taxable sales leakage, overall, the retail sales only (category 1) leakage can yield some surprising results.

To illustrate this approach, my firm, Ultra-Research, Inc., selected Alameda County (14 cities) and Contra Costa County (19 cities) and calendar year 2001 taxable sales data (the most recent year for which the complete data is available).

First, with regard to Alameda County, the county-wide taxable sales per capita was \$15,432. Seven of the 14 cities in the county had taxable sales per capita in excess of the county, indicating no “leakage” on a total basis. These were Dublin (\$34,258), Emeryville (\$96,443) (Note the effect of the impact of the 3:1 ratio of daytime to nighttime population), Hayward (\$19,321), Livermore (\$18,954), Newark (\$23,190), Pleasanton (\$26,271), and San Leandro (\$23,382).

With regard to retail stores only, the estimated percent leakage for these cities is as follows: Pleasanton (0%), Newark (0.5%), Dublin (1%), San Leandro (1%), Hayward (8%), Livermore (12%) and Emeryville (20%-primarily in the auto dealers and auto

(continued on page 4)

JUNE 2003

Photos of APA Northern Section Award Banquet on page 3 and www.norcalapa.org!

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DIRECTOR'S NOTE

If you enjoy the *Northern News* and want to become involved, this is your chance! **Pierce Macdonald** has contributed countless hours over the years and she will be stepping down as Editor in a few months. Thanks to Pierce and the editorial staff, the newsletter has been well received by many planners throughout California and the nation. Please help continue this tradition by becoming the next newsletter editor or by joining the team!

Kudos goes to **Larry Tong** for organizing the Awards Program. Those who attended the Awards Banquet last week at U.C. Berkeley saw many deserving projects being recognized. A tremendous thank you to the Awards Jury [**Bob Brown**, City of San Rafael; **Walter Kieser**, Economic & Planning Systems; and **Dayana Salazar**, San Jose State University] for setting a high standard in making the selections.

We would like to welcome **Jennifer Carman**, AICP, to the Northern Section Board as the leader of our new East Bay RAC. Jennifer is the Planning Manager for El Cerrito. East Bay planners can anticipate some enjoyable social events this year!

You have heard me mention the **2005 APA National Conference** in San Francisco often over the past months. Well, don't expect me to stop any time soon. Although many people have expressed interest in helping out, we actually need many more! The main Conference Committees will consist of programming, mobile workshops, fundraising, merchandise and souvenirs, hospitality, portfolio, public relations, universities and students, and treasurer.

Our Section is also seeking a Professional Development Director [PDD]. This person must be a qualified member of AICP. The duties are to organize and develop a professional development program for Northern Section planners' continuing education. If you are interested in this position, please contact me.

I would personally like to thank San Jose State University's Urban and Regional Planning Department for honoring me with the **Graduate of the Last Decade** [GOLD] award. It is a joy and privilege to be recognized alongside other graduates such as San Francisco 49ers Quarterback Jeff Garcia.

by Hing Wong

COMING UP: 2003 STATE CONFERENCE

APA Central Coast Section will host the **2003 California Chapter APA Conference in Santa Barbara** on September 28–October 1 at the Fess Parker Doubletree Resort. Autumn is the best season to visit Santa Barbara. The weather is warm and clear. You will experience a city that was pedestrian-friendly before New Urbanism was born. Early registration for the conference and the hotel is now available by going to the Cal APA website at www.calapa.org and clicking on the conference section. The registration form is available both as an on-line form and a PDF form. See enclosed registration form in this issue.

NEWSLETTER INFORMATION

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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.



There Are Great Planning Books Out There!

Read one lately? Please submit a book review for inclusion in Summer Reading issue of the Northern News (the July/August issue). Book reviews can be current best-sellers or classics. Articles must be 300 to 500 words in length. Deadline for submission is June 11. This issue will also count readers' favorite planning-related movies. Visit www.norcalapa.org to participate on the Section's interactive chat feature, or send your article to pierce.macdonald@ci.dublin.ca.us

Rail Endorsement/Congressional Scrutiny

The AARP, for the first time, endorsed passenger rail in its annual **The Policy Book: AARP Public Policies**, saying "passenger rail provides essential service to many rural communities." The AARP, known as the American Association of Retired Persons before a name change in 1999, has 35 million members and is possibly the largest membership advocacy group in the U.S. The inclusion of the rail service endorsement was the result of dramatic input of letters, forums and polls, from AARP members and the culmination of a year-long effort by NARP Director Doras Briggs, of Emeryville, Ca. The 2003 edition of **The Policy Book** is remarkable for such recommendations, as:

"Congress ... should support nationwide passenger rail service that is integrated and coordinated with regional, state, and local passenger rail; and establish a dependable funding mechanism that ensures continuing passenger rail service."

Other rail news was not so encouraging for national rail system proponents. During April hearings, some Members of Congress seemed to advocate the discontinuation of many long-distance and rural routes, and

currently two different plans for Amtrak are under legislators' review. On April 25, Amtrak released a detailed five-year plan (2004-08) aimed at getting the railroad back to a "state of good repair." This plan, which calls for a budget of \$ 1.8 billion, declining to \$ 1.5 billion, is currently under review. Amtrak's plan was followed by an April 29 Senate hearing chaired by Senator John McCain (R-AZ) at which DOT Deputy Secretary Michael Jackson outlined a plan which envisions at the end of five years no federal operating grants, and federal capital grants that cover 50% of project costs. This share of funding would be far less than what highway and aviation projects receive.

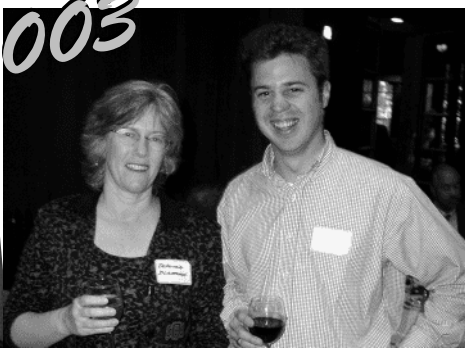
Excerpted from articles appearing in NARP News. Used with permission of the National Association of Railroad Passengers (NARP). For more information, visit NARP at www.narprail.org

Other information on significant changes to funding for mass transit and reauthorization of the nation's surface transportation law, TEA-21 (a.k.a. SAFTEA), can be found at www.planning.org/fromwashington/

Awards Banquet 2003



San Jose State's Ana Ruiz



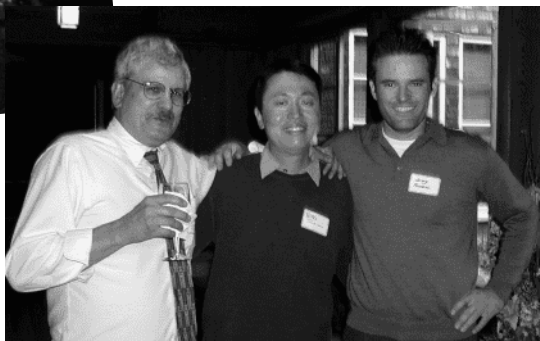
Deborah Diamond and Christopher Wolf



CCAPA President Collette Morse and Juan Borrelli



Sally Brightcloud from Cloverdale



Jerry Haag, NSCCAPA Director Hing Wong, and Greg Powell



Andrea Ouse and Chris Sanfillipo from Colma

supplies category).

As another example, Berkeley had 2001 total taxable sales of \$12,957 per capita, which in comparison to the Alameda County average of \$15,432 per capita implies a 16% leakage relative to all taxable sales categories (i.e., retail and non-retail). Relative to retail stores only, the estimated leakage is 18%. Further details are: 67% leakage in General Merchandise Stores; 27% in Service Stations; and 26% in Auto Dealers and Auto Supplies.

Second, with regard to Contra Costa County, the countywide taxable sales per capita was \$12,592. Five of the 19 cities in the county had taxable sales per capita in excess of the county, indicating no "leakage" on a "total basis". These were Concord (\$19,263), Pinole (\$14,956), Pleasant Hill (\$19,054), San Ramon (\$17,008) and Walnut Creek (\$25,094). With regard to retail stores only, the estimated percent leakage for these cities is as follows: Walnut Creek (0%), Concord (0.9%), Pinole (16%), Pleasant Hill (19%) and San Ramon (20%). Pinole, Pleasant Hill and San Ramon showed major leakage in the auto dealers and auto supplies category.

It is important to recognize, however, that the mere fact that a city is experiencing "leakage" as defined here doesn't necessarily mean that this could be recaptured by building more stores. Examination of the estimated leakage in specific retail categories using the approach outlined above has value to planners in the following ways. It can be used to identify commercial "holes" or sources of sales tax loss, to provide data/information as a starting point for market studies and retail needs assessments, to provide data/information to support commercial planning efforts, and to develop metrics to measure economic impacts and progress over time.

John Rau is a researcher for Ultra-Research, Inc., based in Anaheim. To obtain copies of the specific results for the Alameda and Contra Costa county cities, contact Ultra-Research, Inc. at (714) 779-0151, via fax at (714) 779-7460, or via e-mail at ultraresch@cs.com.

Ethics Violations — Lessons from San Francisco

by Carol D. Barrett, FAICP

The *San Francisco Chronicle* reported last March that three of seven misdemeanor ethics charges against a former San Francisco planner had been dropped. The individual, former San Francisco Planning Commissioner Hector Chinchilla, had been charged for hiring himself out as a consultant to real estate developers seeking permits from the commission on which he served as president. Mr. Chinchilla argued that vaguely worded statements in the city charter and the California Political Reform Act were not, in this case, enforceable. A judge agreed that San Francisco Charter language was too vague. Mr. Chinchilla still faces the remaining four charges.

For planners in the Bay Area, the good news is that the judge did not toss out all of the charges. But in terms of garnering respect for the planning process, it was a sad day for all. That a planning commissioner believed that he ought to take money to advise people on how the commission operates, that he took the money, apparently on a regular basis, suggest that he had a clear interest in personal economic development rather than commission service. Whether legal or not, it is an appalling notion.

For purposes of the newspaper story, and in the minds of the community as a whole, Hector Chinchilla was a planner. The fact that he served as an appointed official did not change his responsibilities. Planners, whether professional or appointed, must be attuned to the impression that the public has when anyone who participates in the planning process is charged with ethics violations. We are all discredited.

A disappointed developer reported in June of 2002 that he had paid Chinchilla \$20,000 to help a project for a mixed-use development (including a Walgreen's) win approval. He was disappointed that it did not get the green light and complained to a Supervisor and then to District Attorney Terence Hallinan. A complaint was filed with the City's Ethics Commission on June 13, 2002, by an architectural preservationist about Chinchilla's involvement in a hotel project at Fifth and Howard.

Chinchilla was arrested in November of 2002. The District Attorney's office accused Mr. Chinchilla of selling his services to developers needing approvals from the San Francisco Planning Commission. Specifically, he was charged with seven counts of conflict of interest for taking \$187,500 from three developers with business before the Planning Commission. If convicted, Chinchilla could face fines and time in prison.

Carol Barrett is the Director of Planning for the City of San Marcos, Texas. She is the former Director of Community Development for Berkeley.



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Applications and job bulletin may be obtained from City of St. Helena, 1480 Main Street, St. Helena, CA. 94574. Phone: (707) 967-2792. Fax: (707) 963-7748 or on the City website at www.sthelenacity.com. Applications due 5 p.m., 6/20/03.

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American Planning Association
2003 PBCD Conference
3rd Annual
Oakland Marriott, City Center
Oakland, Ca.

Who Should Attend

Planners representing every field of professional and technical service, planning commissioners, city managers, political leaders, civic leaders, grass-roots activists and advocates, undergraduates and graduates, and others interested in urban planning and design.

Registration

Registration forms and conference updates will be available online at www.planning.org/divisions/conferences.htm or to request a form via fax or mail contact 2003 Conference Registrar Phyllis A. Smith at (916) 567-2536, voice, or (916) 567-3517.

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To find out how to become a conference sponsor and about the associated benefits of sponsorship, email local conference coordinators,

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Contact Kenya Wheeler (wheelerk@pbworld.com) or (415) 243-4736 for more information.



Recent APA Legislative Conference Highlights Smart Growth

by *Matthew Le Grant*

How the federal government relates to local planning was the focus of the 2003 Legislative and Policy Conference held May 11-13, 2003 in Washington, D.C. National APA organized the gathering which attracted over a hundred planners from across the country. The conference included workshops on smart growth, planning-related federal issues, and effective legislative advocacy. The meeting concluded with attendees going to Capitol Hill to lobby their congressional representatives on key legislation. Several planners from California, including Cal Chapter President **Collette L. Morse, AICP**, attended the gathering. I



Cherry trees blossom over D.C. smart growth conference.

learned a great deal from the conference and felt that APA efforts to build awareness and relationships with legislators were a success.

Smart growth dominated many of the discussions as the term has gained much currency at both the regional D.C. and federal levels. Of course, smart growth, in the form of coordinated land use and transportation planning, is something that APA has advocated for years. Now, as the costs of sprawl, tortuously long commutes, and paving of natural lands increase, evidence abounds for smart growth's acceptance by citizens and politicians alike. The EPA Office of Smart Growth offered several insightful presentations and highlighted new resources in this area, APA and EPA have embarked on several cooperative efforts. Other workshops focused on public

lands, environmental laws, affordable housing, and reauthorization of federal transportation funding.

Speakers included APA Executive Director **W. Paul Farmer, AICP**, and the **Hon. Earl Blumenauer**, of the U.S. House of Representatives (Portland, OR). Representative Blumenauer lauded APA for its efforts toward livable cities and reminded planners that no other group has the public-oriented and comprehensive outlook that planners possess. Paul Farmer noted that recent anti-planning efforts by 'property-rights' groups is evidence that planning's principles are gaining greater consideration. Planners also attended an evening reception in the beautiful Russell Senate Building Caucus Room, home of the Watergate Hearings, to meet congresspersons and their staffs.

For more information check these sites:

2003 L&P Conference proceeds: www.planning.org/legislation/2003policyconf.htm

APA Smart Growth Website: www.planning.org/growingmart/

EPA Office of Smart Growth: www.epa.gov/smartgrowth/

Smart Growth Network: www.smartgrowth.org

Matthew Le Grant is a Principal Planner for the City of Berkeley, and is temporarily in the Washington, D.C. area on a leave of absence. Matt can be reached at mattlg@earthlink.net

Zoning Administrator Karma

by Steve Matarazzo

For several years in the early 90s, I was Santa Cruz County's Zoning Administrator. This function of government (a minority of local governments include it) is very interesting because it involves the simultaneous duties of a professional planner and a conflict resolution expert. You are, in effect, a mini-planning commission, hearing both sides of an argument, and, at times, both sides of a significant neighborhood controversy. Then, you make the decision on the land use entitlement.

One of my more memorable cases involved a proposed daycare facility to be located within a neighborhood church. Many residents of the neighborhood were objecting to the project because it would involve, they said, "children making noise." This negative impact, combined with the additional traffic the daycare would generate would be unacceptable, they concluded vociferously. Other residents were in favor of the facility as they were working parents in need of such accommodations and, as parents, they tended to like children. Many of them had also been children at one time. Here are just a couple of excerpts from that public hearing:

Neighbor A: "Mr. Zoning Administrator, the traffic in this neighborhood is horrendous already. To add anymore would be irresponsible."

Zoning Administrator: "I don't live far from here, and we get very little traffic. However, because traffic has been raised as an issue, I have personally visited the proposed site on numerous occasions, particularly at times of proposed student arrivals and departures. You can play soccer on the streets, there is so little traffic."

Neighbor B: "We already have an elementary school in the neighborhood and we constantly hear the noise of children playing in the playgrounds. Enough is enough!"

Zoning Administrator: "I guess something is wrong with me, but the sound of children playing is music to my ears."

Those are probably uncharacteristic remarks from an impartial bureaucrat. Maybe I should have disqualified myself since my wife and I had been trying to start a family for years. Maybe I should have just stated the facts of low traffic generation and almost non-existent sound readings taken from the perimeter of the property, which were the basis for my non-technical replies. It might have saved me some of the social ostracism that I felt as I encountered the displeased neighbors at the grocery store.

You can probably guess the rest of the story. I approved the use permit. It was appealed to the planning commission, and they also approved the permit. Oh yeah, there is one more thing. My wife and I now have a 5 year-old daughter named Carly and she attends the daycare facility. It is one of the best in the county and I am very appreciative.

Steve Matarazzo is the Community Development Director of Sand City, and the facility is called, Apple After School. Steve offers that "Yes, I am a huge Beatle's fan, too, and if you don't know the Beatles —God have mercy on you." Look for future stories about Carly in this column. Steve can be reached at steve@sandcity.org

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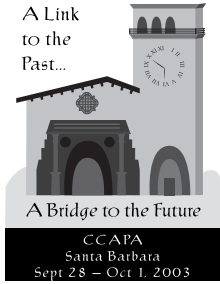
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CCAPA 2003 Conference Early Registration Deadline: August 15, 2003!



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Signature of Department/Program Head _____

School _____ Date _____

Spouse's Name (if registered) _____

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* We welcome members of other organizations whose work dovetails with planning. For more information on whether you or your organization qualify for the member rate, please visit our website at www.calapa.org.

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MW#2 Uptown SB Planners Walking Tour (Sun. PM)	\$20	_____	_____	MW#15 Green Building Tour (Wed. AM)	\$30	_____	_____
MW#3 Downtown SB Planners Walking Tour (Sun. PM)	\$20	_____	_____	MW#16 Casa del Herrero (Wed. PM)	\$30	_____	_____
MW#4 Uptown SB Planners Walking Tour (Mon. AM)	\$20	_____	_____	MW#17 Lotusland (Wed. PM)	\$40	_____	_____
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MW#6 Urban/Suburban Affordable Housing (Mon. AM)	\$25	_____	_____	Opening Reception (Sun. PM)	\$30	_____	_____
MW#7 Negotiating Open Space Protection (Mon. PM)	\$25	_____	_____	Monday Lunch	\$30	_____	_____
MW#8 Facility Planning for Bicyclists (Mon. PM)**	\$20	_____	_____	Breakfast (each) (circle one: Mon. Tues. Wed.)	\$15	_____	_____
MW#9 Mixed Use Projects in SB (Tues. AM)	\$25	_____	_____	Planning Awards Lunch (Tues.)	\$30	_____	_____
MW#10 Planning Urban Forests as Public Utilities (Tues. AM)	\$25	_____	_____				
MW#11 Santa Ynez Wine Country/Casino (Tues. PM)	\$30	_____	_____				
MW#12 Ventura SOAR Tour w/Bill Fulton (Tues. PM)	\$30	_____	_____				
MW#13 Urban/Suburban Redevelopment (Tues. PM)	\$25	_____	_____				

* More details on conference website (www.calapa.org)
 ** Bike rental not included. See conference website for rental rates (www.calapa.org).

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- 3. By Fax** with credit card to 805.965.6230
- 4. By Phone** with credit card to 805.568.0854

NORTHERN SECTION CALENDAR

June

- 11** Deadline for book reviews for the July/August Summer Reading issue. See page 3.
- 14** MTC Summit at the Palace Hotel
- 28** 2005 Conference Planning Committee Meeting. Contact Hing Wong for details

JUNE						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

July

- 10** Northern Section Board Meeting will be at the law offices of Meyers Nave, 555 12th Street, Suite 1500, in Oakland (near 12th Street BART)

JULY						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
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August

- 7** 6:30 p.m. IAPA Regular Meeting. E-mail anderjenn@atti.com
- 7-9** 2003 PBCD Conference, Oakland. See page 5.

September 28 – October – 2003

APA California Chapter Conference in Santa Barbara. See page 2.

“When the last tree has fallen, when the last river has dried, and the last fish caught, then [people] will learn that they can’t eat money.” –Chief Sealth (Seattle)

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Collaborative Neighborhood Planning In Action at SJSU

by Karen Babbitt and Olga Meydbray

"I think in general SJSU made me more sensitive to residents' wants and needs," summed up one graduate student. Since 1997, students and faculty in required classes at San Jose State University Urban and Regional Planning program have utilized the Collaborative Neighborhood Planning (CNP) process to work in collaboration with residents and City staff to propose neighborhood improvements and



Students and residents collaborate at SJSU.

create revitalization plans. Some past plans include the North Campus Area Plan, the Gardner Neighborhood Plan and the Market- Almaden Neighborhood Improvement Plan (recent winner in the Best Academic Project Category of the 2003 APA Northern Section Awards).

During the first semester, students produce a comprehensive community assessment and a set of preliminary recommendations that are shared with residents. Throughout the second semester, students participate in community-building activities such as hosting a neighborhood workshop. The culmination of this process is the production of a viable neighborhood plan that reflects the vision, goals and objectives of local residents.

The scope of student and community recommendations ranges from building designs to streetscape improvements to the addition of parks and community centers. Recommendations included in these plans may later be incorporated into the City's revitalization efforts for each target neighborhood and can be used by residents to apply for project grants.

The process provides needed technical aid to residents and more importantly, trains urban planners to work with the public on all stages of neighborhood revitalization. Many students were surveyed and interviewed in order to understand the effectiveness of these classes in adequately training new planners.

Students reported learning that the community's perspective was different from their own. While this fact may seem obvious, student planners are often unaware that their outlook is filtered through their personal socio-economic, cultural and educational

background. Additionally, workshop organizing was often cited as one of their most important learning experiences. The idea of holding a workshop may have initially appeared daunting, yet the experience prepared students for hosting events as professionals in the field.

Many graduates who are currently working in the planning field stated that their participation in these classes prepared them in very practical ways for their current jobs. They specifically mentioned the importance of acquiring skills in areas such as community outreach, public presentation, report writing and current conditions research, in addition to a command of planning theories and ideas.

Even in light of many past successes, challenges abound. Students frequently stated that not enough time was spent working directly with residents. As a consequence some felt that the classes functioned more as an exercise, rather than as a project that was responsive to residents' needs. "...Students weren't sure where we stood with the residents and what they expected from us" said one student planner. Many were not certain if their recommendations were appropriate or practical for the neighborhood. Furthermore, students stated that one year was not adequate to complete the plan. The time limited can potentially shortchange residents of more innovative solutions to neighborhood issues.

The perspectives of average residents are rarely represented in graduate school planning curriculum. Through their involvement with the CNP process, student planners learn to incorporate a variety of perspectives into their work. The student experience in these classes is crucial since it will determine the future success of collaborative planning in the San Francisco Bay Area. In the words of one student, "There was a lot of emphasis on finding out what the residents think is good for the residents rather than what planning students think."

Written by Karen Babbitt and Olga Meydbray with survey research conducted by Peter Weschler and interviews conducted by Karen Babbitt and Olga Meydbray. For more information, contact Olga Meydbray at elwha22@mac.com