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Newsletter of the American Planning Association California Chapter



## Energy and Land Use

By Michele Rodriguez, AICP, LEED AP

### The Energy and Carbon Connection

Energy Planning in California is changing dramatically since the passage of the Global Warming Solutions Act of 2006 (AB 32) which sets greenhouse gas emissions levels back to 1990 levels by 2020. The State has issued a Renewable Portfolio Standard of 20% by 2012, approved the Long-term Energy Efficiency Strategic Plan, and the California Public Utilities commission's Statewide Energy Efficiency Strategic Plan (2009-2020) requiring zero energy for new residential buildings by 2020, and commercial buildings by 2030. This will have dramatic ramifications to long-term energy



infrastructure planning, energy efficiency strategy, renewable energy generation, distributed energy generation and combined heat and power, nuclear plants, power plant siting, natural gas, transportation, land use and government support.

The electricity and commercial/residential energy sector is the next largest contributor to transportation with over 30 percent of the statewide greenhouse gas emissions. Although electricity imported into California accounts for only a quarter of our electricity, imports contribute more than half of the greenhouse gas emissions from electricity because much of the imported electricity is generated at coal-fired power plants. <sup>1</sup>The Air Resources Board's 2020 target established under AB 32, is a reduction of approximately 30 percent below the projected 2020 emissions. The business-as-usual projections show a significant increase in emissions over existing conditions with a significant portion of that contribution coming from the heating, cooling, and lighting of residential and commercial buildings. Key elements of California's reduction measures include strengthening existing energy efficiency programs, building and appliance standards, and achieving a statewide renewable energy mix of 33 percent.

During the 1990 energy crisis, municipalities began energy conservation programs by adding public policies about subdivision layout, building orientation to take advantage of solar gain, and tree placement to decrease building heat gain. From a community planning standpoint energy has historically been a matter of whether the utility has the capacity to meet demand at build-out. How this demand was met, or what form the energy was provided wasn't questioned. This changed after Al Gore swept the nation with his film "An Inconvenient Truth", and when communities began to prepare Climate Action Plans (CAP). This CAP process requires

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## Energy and Land Use

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establishing an energy baseline to determine which land use used the most energy, so carbon reduction strategies and priorities could be established. The introduction of the United States Green Building Council's Leadership in Energy and Environmental Design accreditation also has increased focus on a building's contribution to energy use. The ideal today is to disaggregate the buildings energy to better understand which appliance, heating-cooling equipment, lighting fixture etc. uses the most energy, and how to make these as efficient as possible, during off-peak use periods.

### California Energy Commission on Land Use and Energy

The California Energy Commission (CEC) has been linking land use and energy for a number of years. In practice, the CEC develops an *Integrated Energy Policy Report (IEPR)* every two years that includes assessments and forecasts of all aspects of the energy industry supply, production, delivery and distribution, demand, and prices. The CEC uses these assessments and forecasts to develop state energy policies to carry out their own energy-related duties and responsibilities. The 2006 IEPR addressed energy and land stating that, "Most planning professionals and the public identify energy, usually electricity or natural gas to cool, heat and light homes, buildings, power equipment and appliances, as a commodity delivered by a service provider, not unlike water and garbage pickup. Today, as California makes plans to accommodate growth, smart growth is proving to have the potential as a powerful, innovative, and largely untapped tool, much as Title 24 has been an extremely effective tool in reducing energy demands of residential and nonresidential buildings. By including energy demand, supply, and infrastructure as central factors in the land use planning equation, the state and local governments can make intelligent use of all resources and meet energy-related goals. Broadening the definition of smart growth to encompass *all* energy saving strategies is a first step. Increasing on-site production of renewable energy (including solar roofing tiles), using distributed generation, and employing energy and resource efficient design approaches are but a few non transportation-related strategies that would fall under a broader definition and produce significant energy savings.<sup>2</sup>"

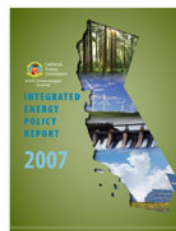
The 2007 IEPR discussed connections between land use, energy, and greenhouse gases through the state-sponsored Blueprint Planning Program. Although they recognized the state has limited land use authority, they identified key leverage points to assist local governments reduce energy and greenhouse gas emissions. The report specifically mentions expanding efforts to provide technical and financial assistance to regional agencies and local governments to facilitate energy efficiency planning and development. They also recommended that utilities be directed to play an active role with regional and local governments to encourage climate-friendly and energy-efficient development in their service areas.

In 2008, an IEPR Update was conducted to report on the status of the 2007 IEPR and to address key physical, operational, and market changes needed for California's electric system to support the 33 percent renewable portfolio requirement by 2020. The CEC said improvements were needed by local governments including an energy element in their general plans, something that continues to be a goal of the Commission. The Strategic Growth Council can provide needed funding that will help support the development of energy efficiency policy and programs. The Energy Commission is represented on the Commission by the Natural Resources Agency.

### Regional, State, Utilities and Energy Planning

The passage of SB 375 in 2008 could take energy planning to a new level as it addresses the regional connection between land use, housing, transportation, and carbon. The Regional Targets Advisory Committee is putting the final touches on their recommendation to the California Air Resources Board on the per capita limit of greenhouse gas emissions.

Utilities can be a resource to local planners by providing information on energy and land use decisions, including the demand created by new development and the cost of infrastructure to serve this growth. Investor Owned Utilities (IOUs) are tasked with assisting



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## Energy and Land Use

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customers to conserve energy via the use of public goods charge (PGC) funds. The PGC is a non bypassable surcharge imposed on all investor-owned utility retail electricity and natural gas sales to fund energy efficiency activities, development of renewable resources, energy research, development, demonstration activities that are in the public interest and which are not otherwise being funded. There are a variety of national, state, and utility incentives available for property owners, as well as the system designer in the case of PG&E super-efficient building design incentives.

Although energy planning could be better aligned with long-term electric utility resource planning processes, municipalities should continue to outreach and partner with electric utilities and energy service providers in order to incorporate energy conservation with supply and demand into existing housing, land use, water supply and wastewater, and transportation planning processes. SB 1317 (Torlakson) is proposed to incentivize and ensure cities that support local energy generation and storage will receive the resulting property tax increase. This type of legislation may encourage long-range energy planning at the local level, lacking local knowledge and resource jurisdictions may want to create a Regional Energy Advisory Committee to establish a vision, goals and strategies.

According to Larry Rilla, Energy Commission Specialist, Special Projects office, "the San Diego Association of Governments (SANDAG), in partnership with the California Energy Commission (CEC) and the California Center for a Sustainable Environment (CCSE), is in the process of developing an update to SANDAG's 2003 Regional Energy Strategy (RES). The RES serves as the energy policy blueprint for the San Diego region, with a primary focus on electricity and natural gas supply and demand issues including resource choices and energy efficiency. The RES framework can be used as a transferable effort for other regional and local agencies as they assess energy issues. The RES elements can also be used in the development of energy performance measures and outcomes for general plan updates, specific plan development, or for Blueprint Planning."

The RES will help guide long-term energy strategies to support the development of SANDAG's Regional Comprehensive Plan and embraces the following energy elements:

- Energy Efficiency and Conservation
- Distributed Generation
- Peak Demand
- Natural Gas
- Land Use and Transportation Planning
- Clean Energy Economy
- Energy and Climate Change
- Renewable Energy
- Energy and Water
- Smart Grid
- Transportation Fuels
- Border Energy
- Energy Assurance Planning

According to Larry, it is important for regional and local governments to:

- Identify specific energy issues (i.e. increasing the diversity of energy supply, reducing energy intensity of water and wastewater processes).
- Identify unique aspects in a jurisdiction that may differ from state policymakers and utility planners.
- Prioritize energy issues that will guide future policy and investment actions and decisions.
- Establish mechanisms to implement energy goals.
- Represent interests at appropriate proceedings such as a utility's long-term procurement plan or state regulatory and legislative activities and other energy arenas (i.e. AB 118 Alternative and Renewable Fuel and the Vehicle Technology Program; AB 3018 Green Economy development).
- Recognize co-benefits of energy policies (i.e. improved air quality, public health, job creation, and financial savings).

Identification of goals and recommended actions of an RES will help communities meet their energy needs while moving toward a path to clean energy future. A successful energy strategy will also help guide communities toward economic sustainability through reduced costs of energy consumption.

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### American Planning Association Energy Resources

The American Planning Association (APA) Legislative Priorities for the 111<sup>th</sup> Congress include two priorities related to energy and climate change:

#### **Promote energy efficient communities**

Reducing energy use and reliance on foreign energy sources requires addressing the design of communities, transportation networks, and buildings. Federal policy and programs should support and encourage the development of 'green' communities and buildings.

#### **Act on climate change**

A comprehensive national climate change program is vital. A federal cap and trade program for climate change should be based on aggressive goals for emission reductions. Federal legislation must recognize the critical role of community development patterns and planning decisions in limiting emissions through sources such as vehicle miles traveled and energy efficiency. Legislation should support local mitigation and adaptation efforts.

The APA is addressing energy and planning in a number of ways. The APA and the Environmental and Energy Study Institute <http://www.eesi.org/> are concluding a three-year research and education project on the integration of climate change and energy issues into planning practice. The first deliverable is an online database <http://www.planning.org/research/energy/database/> of communities that have taken steps to integrate energy issues into planning. The database is searchable by region, state, type of planning tool, topic, timeframe and community size. The database does not have an energy category to sort by, but energy can be found under the climate category. They welcome resources to add to the database, and in particular are looking for long-range visioning documents, local energy plans, management tools, investment tools, and energy projects. If you have resources that could benefit the planning community please send them to [energy@planning.org](mailto:energy@planning.org).

The second deliverable were national energy surveys in 2005 <http://www.planning.org/research/energy/survey/2005/> and 2007 <http://www.planning.org/research/energy/survey/2007/>. The 2005 national survey assessed the current state of planners' capacity, knowledge, and educational needs concerning the integration of energy issues and community planning. Energy was seen as very connected to transportation, smart growth, environmental protection, and economic development. Planners lacked understanding about distributed energy, anaerobic digestion, biomass, passive solar, hydropower, and solar thermal hot water. The 2007 national survey assessed the integration of climate change and energy issues into community planning. Key findings were that in municipal jurisdictions planners are the staff writing energy plans, and a growing number of jurisdictions are writing energy policy and plans. Climate change was viewed as a major factor for the increase in attention, but most communities have not yet integrated energy into zoning or their review processes. More than 1/2 of the respondents did not know about energy incentives offered, such as energy location efficient mortgages or local utility incentives. Both planners and politicians saw energy planning as very complex, which is seen as an obstacle in moving forward.

The third deliverable is an Energy and Climate Report for Planners, which provide essential background information and a practical framework for integrating energy and climate issues into planning. The report covers a full range of planning issues, and planning tools that can be employed to promote energy efficiency and renewable energy.

The APA Legislative Policy Committee developed two additional resources including the Energy (2004) and Climate Change (2008) Policy Guides <http://www.planning.org/policy/guides/adopted/energy.htm> <http://www.planning.org/policy/guides/pdf/climatechange.pdf>.

The APA Planning Advisory Services (PAS) has a number of articles and reports, information about energy plans, model ordinances, and incentives, on wind power, solar energy, and other renewable energy sources.



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### Energy Efficiency Community Block Grant and Energy

The infusion of local dollars from the federal stimulus package has communities scratching their heads about how to proceed to reduce energy and carbon, while creating jobs. The ARRA funding, and the new financing mechanisms are enabling energy-efficient and renewable energy improvements to be affordable.

The City of Los Angeles requested an initial \$250,000 from the Department of Energy to prepare an Energy Efficiency & Conservation Strategy (EECS) to set forth the City's energy efficiency policies and programs, and to guide the expenditure of the City's \$37 million allocation. The effort will be used to develop priorities for expenditure of the allocation, conduct public outreach and request input on the types of projects to be funded, <http://www.environmental.org/EECBG/Public%20Engagement%20Strategy.htm>

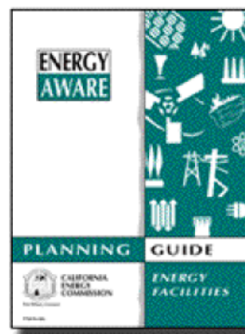
The U.S. Department of Energy (DOE) provides examples of Energy Efficiency & Conservation Strategies, and a variety of related resources in their Solution Center [http://www.eecbg.energy.gov/solutioncenter/eligibleactivities/activity\\_1.html](http://www.eecbg.energy.gov/solutioncenter/eligibleactivities/activity_1.html). Energy or sustainability plans are the basic building blocks used to implement energy efficiency strategies designed to reduce fossil fuel emissions in transportation, building, and other applicable public and private sectors. Ambitious energy efficiency and greenhouse gas reduction goals require long-term strategic planning to effect lasting market transformation for energy efficiency. Various methodologies designed to reduce total energy use and improve energy efficiency include as their first step the development of an energy efficiency and conservation plan which becomes the road-map for detailing priorities, setting goals, and establishing objectives.

The California Energy Commission's Energy Aware Planning Guide [http://www.energy.ca.gov/energy\\_aware\\_guide/P700-93-001.PDF](http://www.energy.ca.gov/energy_aware_guide/P700-93-001.PDF) is another resource for local communities interested in conducting Energy Planning. This Guide includes worksheets for identifying energy efficiency opportunities, renewable energy resources, policy matrix, case studies with implementation ideas and plans, and energy savings and cost information. The CEC is updating the guide, which will include updated information for municipal use.

The Environmental Protection Agency (EPA) resources include the Rapid Deployment Energy Efficiency Toolkit providing information on programs that have clear, measurable, predictable energy savings and create jobs. [http://www.epa.gov/RDEE/energy-resources/ee\\_toolkit.html](http://www.epa.gov/RDEE/energy-resources/ee_toolkit.html). The Clean Energy Action Plan provides energy efficiency, renewable energy, and clean distributed generation best practices <http://www.epa.gov/RDEE/energy-programs/state-and-local/state-best-practices.html#leadbyexample>. The Climate and Energy Tools and Resources Compendium, the EPA searchable database, is designed to help officials plan for and evaluate clean energy policies and programs. The models, calculators, and guidance help communities understand, quantify, and communicate the energy, environmental, and economic benefits of actions. Each of the tools and resources is publicly available at no cost, and can be accessed through the links. <http://www.epa.gov/RDEE/energy-programs/state-and-local/tools.html>

### Energy Planning at the Local Level

Community Planners recognize that climate change is the defining issue of our time, and although the challenge is daunting and global in scale, the response is heavily weighted toward local and regional response. Planners are uniquely positioned to lead communities and regions in finding new ways to meet energy needs, cut greenhouse gas emissions, and face the impacts that climate change may bring. Planners can assist local municipalities in preparing Climate Action Plans by assessing existing conditions, setting targets for reduction, and quantifying the cost-benefits, and program successes. Planners can change public policy that



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## Energy and Land Use

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will result in more compact community forms and patterns of development to result in reductions in vehicle miles traveled and associated greenhouse gas emissions. Once the policy is updated, zoning can be modified, and programs implemented to meet the program goals.

Local governments are being encouraged to "lead by example" and to showcase, with their own facilities and operations, cost-effective strategies for improving energy efficiency, demand side management, and reducing CO2 emissions. The California Air Resources Board recommends a minimum 15% or greater GHG emission reduction target for local government from current levels by 2020 to parallel the State's target. The recently published California Air Pollution Control Officers Association reports titled, *Model Policies for Greenhouse Gases in General Plans*, and *CEQA and Climate Change* are other helpful resources for jurisdictions updating their general plans, zoning ordinances, or developing climate action plans <http://www.capcoa.org/>.

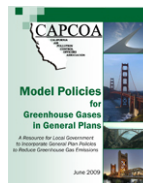
In the next 20 to 25 years more than half of all structures in the U.S. will be designed, constructed and remodeled. This growth presents an unprecedented opportunity to design and build homes and offices, public facilities and communities to a new level of energy and resource efficiency. The State is encouraging municipalities to interact, through public-private partnerships as evidenced by the recently published California Energy Commission's Public Interest Energy Research (PIER) solicitation to help communities develop, pilot, and implement transitioning plans for building their economies on the foundation of stable energy costs and environmental stewardship. AB 811 (Levine, 2008) authorizes cities to provide low-interest loans to property owners with long-term repayments added to their annual property tax bills to help finance energy efficiency improvements and distributed generation installations.

With SB 375 there is an emergence of sustainable community planning, and an opportunity for communities to conduct regional energy planning. Linking energy planning to growth management planning will encourage communities to explore cost-effective opportunities for distributed energy resources development created by smart growth spatial analysis. Planners are only beginning to grapple with the need to integrate energy systems planning into local land use planning, design and development. According to the National Energy Center for Sustainable Communities, linking energy planning to growth management and land use planning would enable local and regional authorities to address distributed generation and other energy infrastructure needs earlier and to maximize efficiencies within community transport, water, waste, and energy systems. Using "whole building" and "community-scale" approaches to maximize energy performance is appropriate. Wherever possible, planning and design should engage community residents in the efficient use of energy and material resources by decentralizing resource management systems to the neighborhood level. Neighborhood-based systems should be designed to provide ongoing systems management of community resources and promote shared energy resources and material and process efficiencies, based on the energy management plans.

Many municipalities are creating positions called Sustainability Coordinators, or Energy Managers to aggregate benefits and help coordinate green functions relating the water, energy, transportation, carbon and land use. In future, all staff working in these areas will be cross-trained in these benefits and functions for better effectiveness. It's imperative that these staffs educate the consumer of the value of energy-efficiency efforts. Consumers will have more willingness to pay for energy-efficient and sustainable design features when there is an awareness of the value proposition. The rating and labeling of products is improving and will help inform consumers about the energy efficiency and emissions reductions. Some industries are moving faster than others, such as the lighting industry which has done an excellent job of making comparisons between the efficiency and life of the incandescent bulbs to the new compact fluorescent and LED lights.

California again sets the precedent for other states by the recent decision to amend the Title 24 energy efficiency standards requiring new residential construction draw zero energy from the grid by 2020 and new commercial by 2030. Nevada recently adopted legislation that triggers energy efficiency audits for all residential real estate transactions starting in 2011.

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EPA's Home Performance with ENERGY STAR programs are providing a mechanism for trained auditors, and contractors to complete the work to a measurable standard. There continues to be debate about the demand for these employees and the level of training and certification required for auditors and contractors. Clearly, a systems approach is of interest considering a host of related mechanisms from appliances, heating/cooling equipment, electronic equipment, lighting, motors, tools, water heaters and occupancy.

The National Energy Center for Sustainable Communities recently completed a pilot program in partnership with San Diego Gas & Electric and the City of Chula Vista. The city conducted facility retrofits and upgrades with energy efficient lighting, heating and cooling systems and installing LED traffic lights. These improvements resulted in reduced City energy costs by \$400,000 annually. The State of California's Emerald Cities program, and the StopWaste.org Green Packages Program, are an example of initiatives that facilitate widespread installation of solar photovoltaic systems, thermal solar hot water technologies in combination with energy efficiency and water conservation measures to minimize the total project costs and maximize monthly savings.

Identifying land use and building types is the first step in conducting an Energy Efficiency Strategy. Staff should realize that the first Building Energy Efficiency Standards (Title 24 Part 6) was created in 1978; therefore it can be assumed that all buildings built before that time should be targeted for energy efficiency upgrades as a first priority.

Measuring and verification is required to ensure that the energy savings are being met through project construction and program implementation. Cities in Oregon are deferring energy fees on projects proposed to yield significant energy savings, but post-construction commissioning is required to verify that the savings are met. If the project does not yield the savings full fees are required.

This is an extremely exciting and challenging time for energy planning at the local level. Community planners can greatly influence how AB 32 goals are met through their land use, zoning, and programmatic response to this challenge.

<sup>1</sup> Climate Change Scoping Plan, California Air Resources Board, December 2008.

<sup>2</sup> IEPR 2006, Land Use and Energy Section, page 72.

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## President's Message

By Kurt Christiansen, AICP, President

### Happy New Year!



For the past year my President's Messages have been focused on Planning around the State and how the economy and budget crisis affected communities throughout the State. As we start 2010, I thought I would tell you a little about my life in the planning world. I am the Economic and Community Development Director for the City of Azusa, a community located along the foothills in the San Gabriel Valley. The City is predominantly Hispanic and would be considered a working class community. During 2009 we had our share of challenges, but the successes clearly outweighed the challenges. I am fortunate to work for a City that embraces smart planning. The City Council understands that in order to provide community amenities development needs to occur. The citizens of Azusa want to live in a community that provides for their daily life. This means a broad spectrum of housing choices, shopping opportunities, and local employment options.

The City is underserved by the retail and restaurant markets. The residents want the ability to shop and dine within the community. During 2009, the City staff went to great lengths to secure a major retailer for the community. In other communities that I have worked for, this meant a regional mall or a Nordstrom. For the City of Azusa, this meant a Target store. During the entire process, the community supported City Staff's efforts to attract this national retailer. On December 3, 2009, the Target Corporation broke ground on a site in Azusa. Over 300 community members attended the ceremony. As I sat on the stage, looking out over the crowd, I was filled with emotion that my Economic and Community Development Department had done a good thing for the City of Azusa. Through a team effort, we successfully brought positive change to the community.

I understand that this is not groundbreaking planning, but the fact that this fills a need in the city, and given the economy in 2009, I am extremely proud of the fact that this project will improve the quality of life for those who live in Azusa. We are making Azusa a great community, one step at a time.

I truly love my job and the city of Azusa. Doing my "day job" makes me very happy! I want to thank my City Manager, Fran Delach, the City Council, and my Economic and Community Development staff for all that they do and their support for my "day job" and my "volunteer job".

As for my "volunteer job", we will continue to enhance the benefits to the members of APA California. I hope that some of you will get to attend the National Conference in New Orleans in April. Registration is now up on the National APA website. If Louisiana is too far for you to travel, the State will be holding its annual conference in Carlsbad, CA, in early November.

#### ***I wish to thank the following members whose terms concluded at the end of 2009:***

Vince Bertoni – Past Chapter President  
Hing Wong – Vice President of Administration  
Lance Schulte – Vice President of Public Information  
Ryan Brough – Student Representative  
Kimberly Brandt – Orange Section Director  
Kevin Keller – Los Angeles Section Director  
Jay Higgins – Central Coast Section Director

I look forward to a very successful 2010 in my professional career and for our American Planning Association Chapter and I wish you success in your cities, agencies and companies.



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## Editorial

By Michael Henn, AICP

Dear Fellow Planners,

I am a long-time planner in the East Bay and former Planning Service Manager of Lafayette CA. I have pursued smart growth and infill goals longer than the term smart growth has been around. I am also involved with greenhouse gas reduction plans both professionally and in my home community where I serve on the Planning Commission. In looking at all the strategies being considered, supportive as I am of almost all of them, I cannot help but be struck by the rather modest results that I foresee coming from all of these efforts combined. I hope that we can achieve the minimum 15% greenhouse gas (GHG) reduction that the California Air Resources Board wants us to achieve. Collectively, I believe, the consequences of the rapid implementation of policies including green building codes, smarter zoning codes, energy retrofit programs, hybrid cars, and replacement of old appliances with more efficient ones, will be more than offset by continuation of two overarching counter trends: continued global population growth and the nation's misplaced but ingrained post-war transportation spending priorities that favor roadways and dispersed growth.

Please consider that the average person in India, for example, uses one-twenty-second as much energy per capita as the average American. What do we expect to happen when those Third World populations develop? Are they going to continue the Indian, or Guatemalan or Dominican carbon footprint, or that of the US? Don't you suspect that they seek development to live like they have or seek the American lifestyle and carbon footprint as conveyed in the growing influence of global media? For instance just in the USA, when one considers that there are about one million legal immigrants to the USA per year, and that number is added to an uncertain number of undocumented immigrants that may be as great as the number of legal immigrants, the increase in GHG emissions from the transfer of these 20+ million people per decade from a low to high carbon consumption environment may inevitably overwhelm optimistic forecasts for USA's absorption of new green technology. Key for the USA is to be a leader in creating a desirable model green society that the worlds developed and developing wish to emulate. World societies developing to a productive and enriching low-carbon lifestyle is the key to address global warming impacts all the earth will share. The USA can be a leader in this important change as the post-war lifestyle model for most of the world.

Regarding transportation funding, vehicle emissions are the greatest contributor to GHG in California. Passenger trains use about 1/6 as much energy per passenger mile as driving alone. Trains use about 1/3 as much energy per passenger mile as airplanes. Moving freight on trains use only about 1/8 as much energy as trucks. Until transportation is non-carbon based, these energy and emission efficiency ratios should be the guideposts for transportation investment. However, consider that the 2009 Federal Transportation budget provides that 81% of the nation's transportation funding goes to highways and airports, the two least energy efficient transportation forms. 14% goes to transit and only 1.6 percent goes to rail. Consequently, it seems to me (Source: <http://www.dot.gov/bib2009/pdf/bib2009.pdf>, p.11), that there is little likelihood that the AB32/SB 375 measures, desirable as they are, will compete with the increases in travel by the least efficient transportation modes. To be truly effective, our transportation spending priorities must match our desired GHG reduction goals. SB 375 holds the possibility of aligning transportation investment with GHG reduction and smart growth. However, this current spending mis-prioritization results from the politicians' belief that the public's love affair with its cars, is unending. And that any significant modal change is political suicide. Can we change that perception with great planning from implementing SB 375 and AB 32 and other smart growth legislation?

I fear that too little action is going to result from our plans to affect climate change in protracted baby steps, particularly those mostly coming from the local level of government. I hope I am wrong. Your thoughts?

Sincerely,  
Michael Henn, AICP  
Piedmont, CA



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## A “Smarter” Future: Regional Tool Box Now Available to Visualize, Design and Fund Smart Growth Projects in the San Diego Region

By Coleen Clementson and Carolina Gregor, SANDAG

With the recent creation of a set of Smart Growth Design Guidelines, the San Diego Association of Governments has completed the fundamental elements of its “Smart Growth Tool Box” to help local communities accommodate expanding populations while at the same time encouraging the development of inviting, efficient, sustainable communities as envisioned by the Regional Comprehensive Plan (RCP).

The SANDAG Board of Directors formally accepted *Designing for Smart Growth, Creating Great Places in the San Diego Region* in June – adding it to the other elements of the Tool Box, which combine to help visualize, plan for, and finance smart growth development.

The San Diego region is expected to grow by one million people and 500,000 jobs in the next 40 years, reaching a predicted 4.5 million people by 2050. Smart growth can play a big role in maintaining and enhancing the region’s quality of life while the community grows. But many people continue to ask questions like:

- What does smart growth look like here in the San Diego region?
- What good examples do we have of existing smart growth?
- What could future smart growth look like in local neighborhoods?

### EXISTING



### CONCEPTUAL



Marshall Avenue at the El Cajon Transit Center, El Cajon, CA

To give concrete answers to these questions, SANDAG has partnered with local jurisdictions and stakeholders to develop a set of materials to help everyone visualize and understand smart growth. Containing both planning and financing tools, the Tool Box encourages discussion in local communities, generates greater support for smart growth principles, and provides incentives and assistance to local governments to implement local smart growth projects.

The Smart Growth Tool Box is key to achieving the goals of the Regional Comprehensive Plan. Adopted in 2004 by the SANDAG Board, the RCP serves as a blueprint for the San Diego region and provides a broad framework for local and regional decisions that can move the region toward a more sustainable future.

### Setting the Stage: The Smart Growth Concept Map

When people hear the words “smart growth,” what might come to mind are dense, compact cities such as New York or San Francisco; or, conversely, they might also picture a walkable small town village like Seaside, Florida. Reflecting this notion that smart growth is not “one size fits all,” the RCP identifies seven smart growth place types tailored specifically to the San Diego region.

The seven place types - Metropolitan Center (which is downtown San Diego), Urban Centers, Town Centers, Community Centers, Rural Villages, Mixed Use Transit Corridors, and Special Use Centers - are characterized by different levels of general land-use intensity and transit service. These characteristics help to provide a baseline guide for how planned and future



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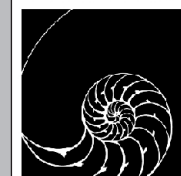
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## A “Smarter” Future

*Continued from page 10*

projects can support smart growth principles, focusing on a mix of land uses, walkability, and connectivity to transit.

To identify these place types in the region, the RCP called for the creation of a “Smart Growth Concept Map” to pinpoint locations where existing and/or planned development reflect the characteristics of the various place types, as well as locations where certain types of smart growth development would be desirable and could occur if existing local plans were modified to allow it. Through a collaborative process with SANDAG, local planning staffs identified their jurisdictions’ existing and planned Smart Growth Opportunity Areas, as well as potential areas. Collectively, they totaled nearly 200 locations throughout the region, with at least one in each jurisdiction.

In 2006, this process culminated with the SANDAG Board accepting the Smart Growth Concept Map. The map identifies the smart growth locations by place type. It also overlays other important regional systems and landmarks, including the existing and planned future transportation network, open space and habitat preserve areas, and major regional employment areas. In 2008, SANDAG and local jurisdictions completed a technical update to the map, which is intended to serve as a bridge between the RCP and local plans and zoning regulations.

The Smart Growth Concept Map is the foundation for other Smart Growth Tool Box initiatives outlined below, including the Smart Growth Photo Library, visualization tools, Smart Growth Design Guidelines, and the Smart Growth Incentive Program.

### A Picture is Worth a Thousand Words: Visual Tools for Smart Growth

To showcase local examples of existing smart growth development, SANDAG has assembled a “Smart Growth Photo Library” of nearly 4,000 photographs depicting existing transit-oriented development, pedestrian-oriented streetscapes, mixed-use buildings, higher-density housing, affordable housing, and walkable and bikable spaces across the region. A sampling of images from the Photo Library is available for free on the SANDAG Web site, and a full 3-set DVD case is available for \$15 upon request.

In addition, to help communities envision the potential of areas on the Smart Growth Concept Map, SANDAG partnered with local jurisdictions and two firms to create two- and three-dimensional visual simulations for several specific locations. These simulations transform photographs of existing conditions by overlaying conceptual smart growth alternatives that complement existing community attributes. The simulations are posted on the SANDAG Web site, and are also included in the Smart Growth Photo Library DVD set.

**EXISTING**



**CONCEPTUAL**



*Euclid Avenue Trolley Station at Market Street, San Diego, CA*

SANDAG encourages planners, architects, community members, developers, academics, consultants, and other interested parties to use the Smart Growth Photo Library and the visual simulations in presentations, brochures, and community meetings to generate discussion about the opportunities of adding smart growth to more places in the region.

### The Nuts and Bolts: Designing Smart Growth

Despite the recent progress, questions about smart growth still remain. For example, if a project is high-density, does that mean it automatically qualifies as a smart growth project? Does a bus station near a mall count as transit-oriented development? How can we tell if a

*Continued on page 12*

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## A “Smarter” Future

Continued from page 11

community plan update is incorporating smart growth principles? Sometimes it is difficult to know if a design is truly enhancing the surrounding community.

To address these and other issues, the SANDAG Board recently adopted a set of guidelines. Entitled *Designing for Smart Growth, Creating Great Places in the San Diego Region*, the guidelines are intended to illustrate for policymakers, local agency planning and engineering staffs, planning consultants, developers, and interested citizens how good design can contribute to the quality of life in the San Diego region.

Both a primer and a technical reference, the guidelines address the importance of design in maintaining and enhancing community character and in creating great public places. Among the topics covered are site design, street design, sustainability, and parking solutions that support mixed-use development and a variety of transportation options. In addition, the guidelines include a “Smart Growth Score Card” that can be used to assess how plans or projects perform against smart growth principles.

### Incentives for Smart Growth: Funding Local Plans and Projects

The region has secured a steady source of local funding for smart growth projects. In November 2004, just after the SANDAG Board adopted the RCP, San Diego County voters approved a 40-year extension of *TransNet* - a half-cent sales tax administered by SANDAG that generates funds for transportation and environmental projects. The *TransNet* ordinance allocates funds to programs that finance smart growth, bicycle and pedestrian infrastructure, habitat preservation, and environmental mitigation projects. SANDAG leverages these local funds to bring in additional state and federal resources.

Earlier this year, the SANDAG Board approved the first round of projects funded under the *TransNet* extension’s Smart Growth Incentive Program (SGIP), Environmental Mitigation Program (EMP), and Bicycle, Pedestrian, and Neighborhood Safety/Traffic Calming Program. The combined value of the projects funded under these programs totaled almost \$20 million.

This long-term funding source allows SANDAG to offer grants to local governments for planning or capital improvement projects that embody smart growth principles in areas designated on the Smart Growth Concept Map, as well as habitat projects that support the regional habitat preservation system. The SGIP and the EMP grant



Old Palm Avenue and 2nd Street, Imperial Beach, CA

programs will be administered every two years, and the Bicycle, Pedestrian, and Neighborhood Safety/Traffic Calming Program will be administered annually. More information about the projects that were recently funded and about the programs themselves can be found on the SANDAG Web site.

### Accessing the Smart Growth Tool Box

The Smart Growth Tool Box also contains other resources, including a speakers bureau, the San Diego Regional Bicycle Plan, and information about the relationships between public health and smart growth. In addition, the new Smart Growth Trip Generation and Parking Demand Study will soon be added to the tool box.

The RCP and the resources in the Smart Growth Tool Box can be accessed online at [www.sandag.org/rcp](http://www.sandag.org/rcp). To order a copy of the Smart Growth Photo Library DVD, please visit the Web site or call SANDAG’s public information officer at (619) 699-1950.

### Major New Planning Efforts on the Horizon

While the Smart Growth Tool Box focuses on providing resources to local jurisdictions and neighborhoods, SANDAG is also involved in a number of other large-scale and long-term planning efforts. The agency is currently working on the 2050 Regional Transportation Plan (RTP), the 2050 Regional Growth Forecast, the Regional Housing Needs Assessment (RHNA), the Regional Energy Strategy (RES)

update, and the Regional Climate Action Plan. To stay tuned to these efforts and others—as well as how the region works to meet the requirements set forth in new statewide climate change laws, including AB 32 and SB 375, and the preparation of a Sustainable Communities Strategy—visit the SANDAG Web site at [www.sandag.org](http://www.sandag.org), or call (619) 699-1950.



E Street Near Bayfront/E Street Trolley Station, Chula Vista, CA

# Thinking Small is Mind Expanding

By Brian Judd, Vice President, Community Planning & Design, The Planning Center

Today's turbulent economy and environmental threats require new, home-grown approaches to coping with limited resources, especially when it comes to long-term planning. Local governments and their citizens across California stand to learn a lot from small-scale innovations that are taking place, sometimes literally, in their own backyards. Recently, The Planning Center in Costa Mesa hosted the first in a series of unique workshops for grassroots organizations to meet with key influential civic decision makers to ensure these small ideas grow into big solutions. At the *Southern California Sustainable Daily Life Projects Workshop*, participants worked on solutions to challenges faced by the grassroots projects and considered how the projects could be extended to benefit a larger number of people. The workshop also drew a connection to how grassroots groups can benefit planners and governments and advance their current knowledge.

The workshop was led by John Thackara, a world-renowned, visionary designer and an expert in creative approaches to using existing resources to help communities meet their needs. Thackara has built a practice around the question, "What would life in a sustainable world be like?"

With their connections across three Southern California counties, The Planning Center brought together an eclectic group of participants representing community organizations, city and county agencies, institutions, and nonprofit and private companies. Five grassroots organizations involved in a wide variety of pursuits, including urban farming, education, neighborhood improvement, and community-based agriculture, presented case studies in which they use existing local resources in a creative, original way. All participants engaged in activities designed to inspire, provoke, and challenge, as well as a brainstorming session for solutions to the practical problems small organizations encounter in their day-to-day operations.

Commonly overlooked by the planning profession, these small nonprofits are worthy of attention, not only because they contribute valuable services to their communities, but because they also provide close-range examples of sustainable economic and environmental practices.

## Daily Life Challenges

The innovative workshop stepped beyond sustainability as theory to reach a true understanding of sustainability as practice. The discovery and sharing of underutilized resources, and how planners could use them in their daily work, was an underlying message of the workshop.

The presenting groups, and what could be gained, included:

Project Hope School in Orange, an alternative school providing education and counseling for some of Orange County's 16,000 homeless children. It struggles with how to mitigate student transportation costs of \$8,000 a month. Participants suggested that the key to solving the transportation problem lies in bringing the school closer to the students, instead of bringing the students to a single location. Planners could help school districts rethink a new, dispersed model for "recycled" school facilities to serve the needs of dispersed populations, such as underutilized churches, hospitals and universities.



Presenter Jules Dervaes, far right, of Path to Freedom in Pasadena, discusses his group's challenges with Dr. Timothy Lindsay of Inland Behavioral & Health Services and Sean Donahue of the Art Center College of Design.



Irene Peña of Proyecto Jardin, a community garden in East Los Angeles, delivers her group's presentation at the Workshop.

Costa Mesa based MIKA is a community development corporation working in a poor section of the city. It establishes partnerships in neighborhoods to help residents develop skills to make changes within their own communities. A group with community knowledge such as MIKA is well positioned to help planners craft goals and policies, and conversely, planners can help MIKA by supporting implementation programs that build involvement and leadership capacity within a community.

## Chapter History Offerings Expand with Video Project, Oral Histories

Following last year's successful 60th Anniversary celebration, APA California has expanded its chapter history offerings, under the direction of Betty Croly, Chapter Historian and Lance Schulte, Vice President for Public Information.

Two new products will result from this landmark effort – a 10-minute video documenting the history of the Chapter, and an expanded array of oral history interviews documenting the role of communities of color in shaping California planning. These are now in development, with projected release of the video at the APA California Conference in September. The material generated will be used to enhance the research products generated for the 60th Anniversary in 2008, and to expand the dialogue about the influence of planning and planners in our communities.

To learn more about the video project, the Chapter's research efforts, or to contribute information, please contact 60th Anniversary Subcommittee chair Steve Preston at (626) 308-2810, or



[spreston@sgch.org](mailto:spreston@sgch.org)



## Thinking Small is Mind Expanding

*Continued from page 13*



Moderator John Thackara addresses the Workshop's attendees in the courtyard of the Environmental Nature Center in Newport Beach, where the event was held.

Proyecto Jardin is a community garden in Boyle Heights, a working-class, immigrant neighborhood just east of downtown Los Angeles. The garden exists on a loaned unused piece of property belonging to White Memorial Hospital, and is becoming a center for training local residents in green jobs. Governments and planners can create community gardens, whether they are on public, private, or institutional land, and implement programs for improving access to healthy food and for training community members to organize and teach others about nutritious food and urban farming.

Path to Freedom, a family-based organization in Pasadena, has created a self-sufficient urban homestead on 1/5 of an acre, a typical suburban plot. The family harvests 6,000 pounds and more than 350 separate varieties of fruits, vegetables and edible flowers annually. To encourage healthy eating and reduce car trips, planners and governmental agencies can institute policy and design decisions to promote the use of front and backyards for agriculture, as well as ease restrictions that discourage this practice.

Informing the public and decision makers would help the Los Angeles Unified School District Gardens in Education Program, an initiative with successful sites on a handful of LAUSD campuses. Their presenters informed workshop participants that California is spending more than \$20 billion on "green" school buildings, and the state spends \$65,000 per classroom seat for the building—versus \$1 per child per year for garden upkeep and support. Participants all agreed there are great potential benefits to linking Gardens in Education programs to community services like food banks and joint-use community agriculture. Planners designing or writing policies about school facilities or parks should consider outdoor space around schools as a part of the school to jointly serve the school and the community—with both educational and agricultural benefits.

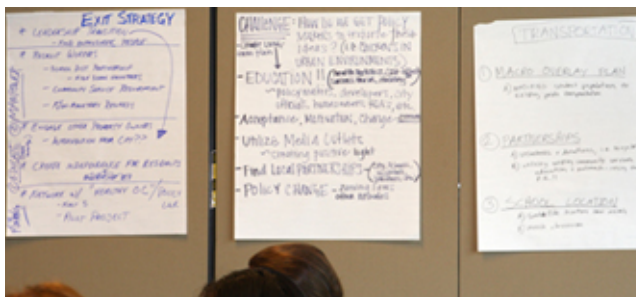
### Include Existing Micro Resources in Planning

The benefits gained from the workshop are manifold. By bringing nonprofits and policymakers to the same table, each was able to recognize the valuable facets of the other. Events such as this go far to bridge the gap between policy makers and the grassroots groups actively engaging in projects on the ground. For planners and civic decision makers, the workshop provided the opportunity to learn firsthand about current implementation of sustainability, and not just government interaction that puts ideas into practice. Times have changed, and governments can't do the heavy lifting alone. They must connect with grassroots organizations to advantageously benefit communities in the long run.

For planners who commonly do their work in front of a computer without really understanding what the end user may do, a workshop such as this is eye opening. In organizing the event, The Planning Center sees new awareness of overlooked resources as beneficial to potentially all levels of planning. The workshop showed the importance of going outside one's comfort zone and thinking of innovative ways to benefit the larger whole. For a start, inventories of microscale civic assets, namely underutilized buildings, land, talent, and organizations, would augment planners understanding of neighborhoods. Furthermore, planning frameworks and processes that accommodate partnerships with small-scale, non-governmental groups would result in more effective plans.

Ultimately, these small-scale grassroots projects, while not engaging with the official city and its regulatory apparatus, challenge and inspire planners to reconfigure their thinking - and their planning mechanisms.

For more information, contact Brian Judd at The Planning Center at 714.966.9220 or [bjudd@planningcenter.com](mailto:bjudd@planningcenter.com).



Wall postings of ideas created in a breakout brainstorming session which sought to find answers to challenges faced by the presenting non-profit groups.

## How to Login for the First Time



APA California Chapter members are

now able to login to gain access to Members-Only capabilities. Have you forgotten your password? To reset it, or to login for the first time, click on the link "Forgot your Password?" in the lower left area of the homepage; type in the email address APA California Chapter has on file for you, and you will receive an email with your user name and a link to reset your password.

## AICP Information(CM)



AICP's Certification Maintenance (CM) program helps planners gain

the knowledge and skills they need to remain current in the practice of planning. CM strengthens the value of certification, and demonstrates a Certified Planner's ongoing commitment to excellence to elected officials, community leaders, and employers.

Information about CM can be found at <http://www.planning.org/cm/index.htm>

# Legislative Update

## Planning Grant Criteria Draft Available: Strategic Growth Council Begins Grant Process

*By Sande George, Stefan/George Associates, APA Lobbyist and Executive Director*



As you know, Proposition 84, passed in 2006, authorized the legislature to appropriate grants and planning incentives that reduce energy consumption, conserve water, improve air and water quality, and provide other community benefits – a very rare but much needed source of planning revenues. Currently, about \$65 million is available for the Sustainable Communities Planning Grant and Incentives Program remaining out of the

original \$90 million planning pot in Prop 84 (some monies have already been allocated/set aside for Strategic Growth Council administrative costs, costs related to the sale of the bond and modeling) and another \$63 million is available under the Urban Greening Grants program for the purpose of creating urban greening plans that will serve as the master document guiding and coordinating greening projects in the applicant's jurisdiction.

SB 732 Steinberg, (Chapter 13, Statutes of 2008) specifies requirements and discretionary actions for the sustainable communities planning grant and incentives program. It also established the Strategic Growth Council (SGC), composed of agency secretaries from the Business Transportation and Housing Agency, California Health and Human Services Agency, California Environmental Protection Agency, the California Natural Resources Agency, the Director of the Governor's Office of Planning and Research, and a public member, appointed by the Governor. SGC is tasked with

coordinating the activities of state agencies to: improve air and water quality, protect natural resource and agriculture lands, increase the availability of affordable housing, improve infrastructure systems, promote public health and assist state and local entities in the planning of sustainable communities in meeting the goals of AB 32.

One of SGC's primary objectives is to manage and award the Prop 84 planning and urban greening grant funds.

SGC released its draft grant guidelines for both pots of money recently. APA California is currently writing comments on the guidelines that will be posted on the APA website when completed. Under SB 732, grants will be awarded to cities, counties, Metropolitan Planning Organizations (MPOs), Joint Powers Authorities (JPAs), Regional Transportation Planning Agencies (RTPAs), and Council of Governments (COGs). These guidelines establish the process that will be used to solicit the applications, evaluate proposals and awards grants under this competitive grant program. The Council anticipates two or three funding cycles.

### Legislature Returns January 4, 2010

The Legislature will return January 4 for the second year of the two-year session. Estimates are that the state is already facing a \$21 billion budget deficit. All 2009 legislation still remaining in the first house must be passed out of the first house by the end of January or will be officially declared dead for the year. New 2010 legislation, no doubt including many planning bills, will be in print by the end of February. Get ready.

The grant process is in its initial stages. It will be months before actual grants are awarded to eligible entities. Here is the calendar:

December 10, 2009	Initial comments on the guidelines are due
December 10 - February 9, 2009	Additional comments accepted on the draft guidelines
January 11, 2010	Guideline comments will be posted on-line
Early January, 2010	Proposed final guidelines posted
February 9, 2010	Adoption of the proposed guidelines
Mid to late February	Solicitation for grant proposals
March - September	Technical support workshops for applicants
	Application Review
	Funding recommendations to SGC
	Final funding decisions by SGC

Also within this timeline, the Legislature will be asked to allocate the funds and the bonds will have to be sold by the Treasurer.

To view the guidelines on line, go to: [www.sgc.ca.gov](http://www.sgc.ca.gov)

## The California Office of Traffic Safety's Pedestrian Safety Assessments Program

By Meghan Mitman, AICP, Fehr & Peers and Matthew Ridgway, AICP, PT, Fehr & Peers

Since May 2008, Tech Transfer has been providing free Pedestrian Safety Assessments (PSA) to California cities upon request, thanks to a vision and funding from the California Office of Traffic Safety (OTS), through the National Highway Traffic Safety Administration (NHTSA). The PSA program is based on OTS' successful Traffic Safety Evaluations (TSE) program and features an independent assessment by two pedestrian safety expert evaluators. As of September 2009, 21 California cities have already received a PSA. This article highlights the components of the PSA and concludes with information on how cities can apply for this free service.

### Step 1: Assemble Background Data and Documents

Prior to visiting a PSA city, the evaluators determine how the overall pedestrian safety in that city compares with other California cities of similar population size. This is a useful first indicator of the overall pedestrian safety in that city. In ranking California cities with respect to their pedestrian safety performance, evaluators use frequencies as well as rates.

The evaluators also contact the city's representative(s) to request data, documents, and other information deemed relevant for the PSA. Information requested may include:

- Traffic Volumes
- Pedestrian Volumes
- Pedestrian Collision "Pin Maps", Collision History, and Collision Reports
- Transit maps including schedules
- Recent planning and engineering documents and studies, including the *Pedestrian Master Plan*, if available

### Step 2: Conduct Policies, Programs, and Practices Pre-Visit Interview

In this phase, the evaluators conduct a two-hour telephone (and/or email) survey with city staff regarding the city's *General Plan* and *Pedestrian Master Plan*, and pedestrian-safety related programs, activities, and policies.

### Step 3: Benchmark Policies, Programs, and Practices

Through benchmarking, the policies, programs, and practices interview responses are grouped in three categories: "does not meet," "meets," or "exceeds" best practices. Based on the benchmarking results, the evaluators develop recommendations to enhance the city's policies, programs and practices. Recommendations include resources from best practices in other jurisdictions.

### Step 4: Conduct Walking Audit

With the first three steps completed, the evaluators visit the PSA city for two days. After a brief presentation of the benchmarking results and recommendations, the focus of the field visit is a walking audit. Focus areas for the walking audit are selected by the PSA city with input from the evaluators.

During the walking audit, positive practices are observed and issues and opportunity areas are noted. Based on their availability, participants in the walking audit may include those who can provide "real-time" information on the focus areas, such as pedestrian destinations, collision history and common "near misses," demographic or other relevant neighborhood context, and current city policies and practices. Additionally, persons who are (or will be) responsible for planning and/or implementing safety improvement measures may be included in the audit.

### Step 5: Identify Pedestrian Improvement Measures (Engineering Best Practices)

Following the walking audit, the evaluators develop initial recommendations for site-specific and citywide pedestrian improvements. The group reconvenes on the second day of the field visit to debrief the walking audit observations and resulting recommendations.

### Step 6: Technical Report

After the field visit, the evaluators prepare a technical report for the city describing their findings and recommendations from the data collection, interview, and walking audit. The report offers recommendations on collision "hot spots" as well as for key pedestrian nodes and along desire lines. The report includes a list of additional resources and reference documents. Many pedestrian improvement measures recommended in the report provide a basis for the city to apply for grants to implement the recommendations and/or conduct further studies.

To learn more about Pedestrian Safety Assessments or to request one for your city, simply send an email to [pedsafety@techtransfer.berkeley.edu](mailto:pedsafety@techtransfer.berkeley.edu). Information, including the technical guide for conducting PSAs, is also available on the [Pedestrian Safety Assessments page](#).

## Recent Awards

The PSA program has been the recipient of several awards, including:

- American Planning Association (APA) Northern California Chapter 2009 Best Practice Award
- APA California Chapter 2009 Best Practice Award
- Institute of Transportation Engineers (ITE), Transportation Planning Council 2009 Best Program Award (international award)
- PSAs are available to a limited number of cities in 2009-2010, thanks to a continuing grant from OTS.

### California Office of Traffic Safety

[www.ots.ca.gov](http://www.ots.ca.gov)

[ContactOTS@ots.ca.gov](mailto:ContactOTS@ots.ca.gov)

Additional information on the PSA model and Fehr & Peers is available at [www.coolpedestrianenvironments.org](http://www.coolpedestrianenvironments.org).



Construction of PSA Recommendation for the Intersection of Fresno and L Street in Fresno, CA



Completed Installation of PSA Recommendations for the Intersection of Fresno and L Street in Fresno, CA

Photo courtesy of Bryan Jones, City of Fresno



# Tax Tips for Planners

## Practical Advice for Professional Development, Education, and Business Expenses

By Al Zelinka, AICP

With the AICP Certification Maintenance (CM) program in full swing, many planners have their sights set on the magic number “32” - that is, 32 hours of continuing education CM credits are required every two years to maintain good standing as an AICP-credentialed planner. While opportunities exist for no cost or low cost continuing education opportunities to achieve the CM requirements, many continuing education courses involve some level of expenses. Additionally, with the downturn in the economy, employers are cutting continuing education and professional development budgets necessitating planners to shoulder more of the responsibility for expenses related to the CM program.

A suggestion by Carol Barrett, FAICP, Vice President for Professional Development, for APA California, provided the impetus for this article. Specifically, the question was asked: “What do planners need to know about deducting CM-related expenses from their taxes?” As an accounting major for three years before discovering planning as a profession, I was eager to prepare this article for California planners. What follows are the outcomes of a question and answer session with tax accountant, Jeff Whitton, CPA.

**AZ: In general, what types of expenses not covered by employers can a planning professional write off on their personal taxes?**

*JW: An employee can write off all business expenses that are not reimbursed by an employer that are reasonable and necessary business expenses. This would include auto expenses, uniforms, meals and entertainment, home office expenses, supplies, education, etc. All of these expenses would be deductible as employee business expenses on schedule A subject to the related limitations.*

**AZ: In terms of expenses pertaining to education and professional development, what specific expenses are permissible by the IRS for planning professionals to itemize for deduction on their personal taxes?**

*JW: All education expenses that better your ability to perform your current job are deductible [this includes CM-related courses]. Generally, only when the expenses are unrelated to your job or they are necessary to meet the minimum requirement to obtain your job, or they qualify you for a new job (like a law degree or some other degree that qualifies you for a new profession) areas there problems with deducting them as an employee business expense. There are also education credits that can be claimed for certain education expenses. The lifetime learning credit provides a 20% tax credit on up to \$10,000 of qualified tuition and fees paid during the year and has none of the requirements required to be deducted as an employee business expense..*

**AZ: Under IRS rules, how much of an itemized expense is deductible?**

*JW: All employee business expenses are considered “other miscellaneous itemized deductions” that are subject to the 2% AGI (i.e. adjusted gross income) limitation. Only miscellaneous itemized deductions over 2% of AGI are deductible. There is also a reasonable or necessary requirement; so, if the expense is clearly extravagant or unnecessary, the IRS can deny the deduction.*

**AZ: Do the allowable deductions for educational expenses apply equally to professionals employed by the public sector as they do for those employed by the private sector?**

*JW: There are always exceptions, tax law is never black and white, and I have not researched this in detail, but generally, whether you are employed by the government or you are employed by a private business, you are still an employee in the business of earning a profit. There are lots of specific rules, but as long as you have already met the minimum educational requirements for the employee position you hold, the education expenses*

## Join the APA California Legislative Review Teams

The APA California Legislative Review Teams are once again gearing up to review the new planning-related legislation introduced in 2009. To get more information on the teams, please visit the APA California website, [www.apacalifornia.com](http://www.apacalifornia.com). If you would like to become a member of the Review Teams, please e-mail me at



[sgeorge@stefangeorge.com](mailto:sgeorge@stefangeorge.com)



## Tax Tips for Planners

*Continued from page 17*

are connected to your business as an employee in the position your hold and they do not qualify your for a new position that you are seeking, they are generally deductible as employee business expenses to the extent they are not reimbursed by an employer.

**AZ: Would the same apply - in general - to entertainment expenses? For example, if a government employed public planner takes a planning consultant to lunch to talk shop, can the public planner write that expense off?**

*JW: I believe it would. As long as the entertainment was ordinary and necessary to the persons employment, if not reimbursed should be deductible.*

**AZ: What types of documentation should be maintained by planning professionals pertaining to these deductions?**

*JW: Receipts should be maintained for all deductions in excess of \$25.00. For meals and entertainment, you should keep the actual receipt and note on the receipt who you were with and the business purpose of the meeting or entertainment. For auto expenses, you should maintain a log or some other record that clearly documents the business versus personal use of the auto.*

**AZ: What IRS forms are most commonly used for deductions pertaining to expenses incurred by employees not covered by their employer?**

*JW: Form 2106, employee business expenses are generally used to report unreimbursed employee business expenses and the total for this form is reported on Schedule A of Form 1040.*

**AZ: What are some of the common "red flags" pertaining to IRS audits for deductions of expenses incurred by employees not covered by their employer?**

*JW: The magnitude of the expenses relative to other returns is a big red flag. Another would be only having one automobile and reporting that it was 100% used for business - there would obviously be some personal use of the vehicle.*

**AZ: What helpful hints and rules of thumb can you provide to planning professionals for organizing and maintaining information for deductions?**

*JW: Make sure you have receipts with contemporaneous notations as to who you met with and the purpose of the meal or entertainment. Keep some kind of records on auto use, so you have a basis for determining personal versus business usage.*

**AZ: What on-line resources can you recommend for more information?**

*JW: [www.irs.gov](http://www.irs.gov) is a great site with lots of information and can get any form. The IRS publications which can be downloaded from the site are generally very good and can give you a good general background [e.g., a good resource is IRS Publication 970 - Tax Benefits for Education].*

**AZ: Is there anything else professional planners should know?**

*JW: Don't be afraid to take the deductions you are due. As long as you have the documentation to support the deductions, the IRS is generally very accommodating, you are in the driver's seat.*

**AZ: Jeff, please share a little about you.**

*JW: I am a partner with Bryars, Kuykendall, Tolleson & Whitton, LLP, with offices in Orange and Laguna Hills, California. For over 25 years I have practiced as a Certified Public Accountant. I have a Masters degree in Taxation from Golden Gate University and a Bachelor degree in Accounting University of Arizona. I can be reached at (714) 633-5661 and [jwhitton@bkwcpas.com](mailto:jwhitton@bkwcpas.com).*

The challenges facing communities are often complex. Planners have long been dedicated to ongoing education and professional development to most effectively address these challenges. The AICP Certification Maintenance provides an additional motivation for planners



## APA California Creates Facebook Group for Members

By joining, members will have another avenue to receive and share with like minded friends' up-to-date information regarding the Association and to network with each other.



[Check out our Links, Events and Discussion Board](#) for information

about our new free lending library for AICP certification maintenance, legislation that is happening now in the California legislature and administration that will impact planning: view the hot bills, get copies of legislation and regulations, and find out how you can provide input, and much more.

We encourage you to accept this invitation to join the APA California group and begin to enjoy this new service for our members.

## Tax Tips for Planners

*Continued from page 18*

to advance knowledge and skills throughout their careers. Given the current state of the economy and the tickle down impacts on the budgets of public, private and non-profit employers, planners – now, more than ever – are seeking no-cost or low cost ways for CM-accredited continuing education. When expenses for professional development are unavoidable, planners should understand and leverage opportunities for deductions on their personal taxes. As lawyers, architects, engineers, and others have known for a while, mandatory continuing education to maintain professional credentials does not have to be expensive nor must expenses be unduly shouldered by the professional.

To learn more about no-cost or low-cost CM continuing education opportunities, please visit [www.planning.org](http://www.planning.org), [www.calapa.org](http://www.calapa.org), [www.cyburbia.org](http://www.cyburbia.org), or [www.planetizen.org](http://www.planetizen.org).

*Al Zelinka, AICP, is the Planning Manager for the City of Fullerton, and APA California Professional Development Program Director, South (San Diego, Inland Empire, Orange, and Los Angeles Sections). He can be reached at [alz@ci.fullerton.ca.us](mailto:alz@ci.fullerton.ca.us) or (714) 738-3347.*

## Planners on the Move



**Amy Skewes**

**Environmental Science Associates (ESA)** is pleased to announce that **Amy Skewes-Cox, AICP** has joined the firm as Senior Project Manager for Community Development in ESA's San Francisco office.



**Joan Sollengerger**

**UC Davis** announces the one-year appointment of **Joan Sollengerger, CalTrans** Transportation Planning Chief as Deputy Director of the Urban Land Use and Transportation Center (ULTRANS) at the UC Davis Institute of Transportation Studies).

## APA California Chapter Broadcasts Information



**APA California Chapter** will be broadcasting important information to your e-mail address. So that you don't miss out on these important messages, please check your e-mail address with National APA. You can review and update your membership information online at [www.planning.org](http://www.planning.org). On the home page, go to the Member Services drop-down list and choose the Membership Database link. You will need your membership number which is located on your Planning Magazine label or your dues renewal invoice. Please call 916.736.2434 if you need assistance or further information.

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# Commissioner's Corner

By Mike Notestine

## Update on Commissioner Training



I started the last article with "As long as I have been doing this 'Commissioner stuff' I find that I am still learning – too bad most of what I am learning is while sitting behind the dais." In mid-October that statement was confirmed, I was re-exposed to a lot of very relevant information.

### Sacramento Valley Update

In October the Sacramento Valley Section initiated its Commissioners training program with Janet Ruggiero and the Sacramento Council of Governments. We covered Planning 101 with Commissioners from over 24 jurisdictions (also attending were several staff members, a few of electeds, members of a Community Service Commission and a representative of a Transportation Advisory Committee). In total, 17 participants attended a Saturday morning session and 23 attended a Thursday evening

session. Some comments from the evaluation forms included:

- "I will now look at projects and policies from a broader regional perspective."
- "I learned to step back and look not only at a project but also to its relationship the physical and social context."
- "I wish I had done this 5 years ago."

The next set of topics scheduled for the spring will include: Mobility for Commissioners, Sustainable Community Design and Environmental Issues.

### Orange County

The Planning Directors Association of Orange County has been providing training since the 1990s. Originally, the training was oriented toward Planning Officials. However, in the last 2 years the program has been expanded with an emphasis on informing Planning Commissioners.

Historically the program included a 1 day seminar. This year, however, the program was reduced to a half day session. The reason for the constriction was due to keeping costs low to broaden the affordability for Commissioners and staff alike. The cost for the program was \$65 and included breakfast with the presentation.

In the past, ethics training has been a very successful program in Orange County. Other significant topics have included changes in development trends and Staff-Commission relations. The Orange County programs tend to be less technical and places more emphasis on policy issues.

The working theme of this year's program was "New Realities in Local Government: Hitting the Reset Button." The keynote speaker was Bill Fulton - City of Ventura Councilmember, planning author and professor, and publisher of *California Planning & Development Report*. Following Bill's presentation, the program included an optional lunch discussion with the Orange County Planning Directors titled "Life from the Corner Office - Tips and Tricks from the Orange County Planning Directors". The program was held at the Richard M. Nixon Library in Yorba Linda and included an optional tour of the Library.

In San Diego, the Section in conjunction with the San Diego COG co-hosts an all-day Planning Commissioners workshop. The annual workshop provides background on regional planning issues relevant to what the Commissioners are hearing in their respective jurisdictions. The workshops also focus in detail on 2 or 3 key issues. Last year, San Diego's Planning Commissioners workshop focused on climate change in response to AB 32 and SB 375, water, and the new Regional Transportation Plan update project.

Oftentimes, it proves difficult to find individuals in any of our communities with the necessary background and training (and who are willing and able to volunteer their time) to serve as a Commissioner. We all can't come from the planning and development fields. The fact that we have people with diverse backgrounds is a great strength yet can also be a great weakness. Having a variety of perspectives at the dais is invaluable. On the other hand, it also means that there needs to be a common basis of understanding from which we operate. Commissioner training programs can provide precisely that, a common ground that will enable members to act and communicate responsibly and effectively. More importantly, it means Commissioners have knowledge of current trends and techniques that can help us shape our communities in the best possible ways.

## Cal Planner Production Schedule

Issue	Submit Articles	Issue Emailed
March/April	1-29	2-26
May/June	4-2	4-30
July/August	6-2	6-30
September/October	8-3	8-31
November/December	10-1	10-30

*Dates subject to change.*



For article and photo specifications, display and call card information, please check out the website at [apacalifornia.org](http://apacalifornia.org).

## "Quick Leg Info" Feature Now on Website Homepage



APA California Chapter has a quick legislative information feature - members can now quickly and easily access key information right from the home page, without signing in. Under the new QUICK LEG INFO feature (under the Consultant Directory link), just click on the "Hot Bill List" link. That link connects members to reports on the hot bills, APA California Chapter positions, and the status of each measure.

Please take the time to review this time-saving new feature.

# CPF Does it Again!

## \$25,000 Raised at Scholarship Auction, \$48,000 Awarded to Students

By Virginia Viado, URS Corporation

Despite our current economic climate, 2009 proved to be another year of continued success for the CPF Scholarship Fund as *yet another breaking* amount in student scholarship funds was raised at the APA California Conference in Lake Tahoe and several student scholarships and awards were issued. These achievements would not have been possible without the generous support of APA California Sections and members, Friends of CPF, and the numerous auction donors and volunteers. CPF distributes all proceeds from its fundraising activities toward scholarships and we look forward to being able to award another generous round of scholarships at this year's conference in San Diego.

### 2009 Scholarships

The CPF Scholarship Fund awarded over \$48,000 in scholarships to graduate and undergraduate planning students who will become practicing planners in California! This year's scholarship winners, selected by the faculty in each planning program, were acknowledged at a special awards luncheon during the conference.

### CPF Auction

The annual auction event featured John Bridges and Alex Amoroso on the stage as Co-Auctioneers, and with the generosity of winning bidders at the live and silent auctions, as well as those who purchased raffle tickets and made gracious cash contributions, **\$25,000** was raised for the CPF Scholarship fund! Thanks again to those who donated wonderful auction items and raffle prizes, as well as to our volunteers who assisted with the event and raffle ticket sales.

A special thank you goes out to the *Friends of CPF* below whose contributions provide support for the scholarship fund. Additional thanks to APA California Sections participating in the annual Section Challenge: Los Angeles, Orange, Inland Empire, Northern, San Diego and Sacramento.

### 2008-09 Friends of CPF

Stanley R. Hoffman Associates  
Jacobson & Wack Planning Consultants  
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Janna Minsk, AICP & Carl E. Morehouse, AICP  
George Osner, AICP  
Lisa Wise Consulting  
Cynthia Bowen, AICP  
Kurt Christiansen, AICP  
Woody Tescher

### 2009-10 Section Challenge Winner

**Northern Section** (largest single package bid of \$2,200)

### Looking Forward . . . San Diego

As we enter 2010, we look forward to even greater successes in our goal of raising funds for scholarships and providing economical, timely, and relevant professional development workshops for the practicing planning professional. Many thanks to APA California members for continued support of CPF's efforts and we hope to see you at the next auction in San Diego on November 2, 2010! For more information, please visit our website: [www.californiaplanningfoundation.org](http://www.californiaplanningfoundation.org).

