OPERATING PROCEDURES FOR THE COMMUNITY PLANNING ASSISTANCE TEAM PROGRAM OF APA CALIFORNIA

APA California has established a Community Planning Assistance Team (CPAT) program to provide pro bono planning assistance to financially constrained municipalities and community organizations to help them address specific planning problems or opportunities. The program was initiated by the Planners Emeritus Network (PEN), and the APA California Board has authorized PEN to administer the program on behalf of the Board. The purpose of this document is to set forth operating procedures for the CPAT process.

KEY ACTORS:

Both the APA and the municipality (or community organization) have a set of key actors in the CPAT process as follows:

 APA\_\_ MUNICIPALITY (COMMUNITY ORG.)

 APA California Board City Council (Board of Directors)

 PEN Board City Manager (Director)

 PEN CPAT Committee Primary Contact Person

 Team Leader Local Organizing Committee

 Team Major Stakeholders

 Community at Large

REVIEW OF APPLICATION:

The first step in the process is review and action upon the application of a municipality or community organization. The CPAT Committee of PEN is responsible for the initial review and recommendation. The Committee takes the following factors into account in determining the viability of a proposed project:

 -clarity of description of issue/opportunity

 -ability of a CPAT process to successfully address the issue/opportunity

 -need of municipality or community organization for pro bono assistance

 -involvement of major stakeholders in proposed project

 -commitment of primary contact person (champion)

 -commitment of municipality or community organization to pay the Team’s

 out-of-pocket expenses

The Committee’s evaluation of the proposed project is based upon its review of the formal written application, consultation with APA members who may be familiar with the municipality or community organization, and, if at all possible, a visitation to the community by a member of the Committee. In some circumstances a Team Leader may be identified before an application is approved; in such cases, the Team Leader may also participate in the community visitation.

The PEN CPAT Committee makes its recommendation on the application to the PEN Board. If the recommendation and action of the Board are favorable, the President of PEN takes the application to the APA California Board with a positive recommendation. Final approval or disapproval of the application rests with the APA California Board.

ESTABLISHMENT OF FORMAL RELATIONSHIP WITH APPLICANT:

Communication of the PEN CPAT Committee with the applicant normally begins before the application is approved. Issues are clarified, questions are answered, and the applicant’s understanding of its responsibilities during the project are confirmed. The pre-approval visitation is also arranged.

Once the CPAT application is approved, a Memorandum of Understanding (MOU) between the applicant and APA California is drafted by the Committee, approved and signed by the President of APA California, and forwarded to the applicant for signature. The executed MOU clarifies the responsibilities and expectations of the community and of APA California. The Community agrees to reimburse team members for their out-of-pocket expenses for transportation, food, and overnight accommodations (when necessary), and to provide facilities and materials necessary to undertake the project.

SELECTION OF THE TEAM:

The PEN CPAT Committee assembles a team with the expertise needed to successfully address the issues raised by the project. The first step is to identify a Team Leader who has technical skills appropriate for the approved project and managerial skills necessary to effectively lead a team of professional planners. The Team Leader then works with the Committee to select the other members of the Team. Such a Team would normally consist of four to six members. The first source of potential members is the list of CPAT volunteers maintained by the APA California staff. The Committee may often reach beyond the list of volunteers to obtain specific expertise required by the project, including (if necessary) professionals who are not members of APA.

Each member of the Team is required to sign a liability waiver which releases APA California from all liability relative to the proposed CPAT project. The executed waivers are forwarded to APA California staff.

PLANNING THE EVENT:

The specific date(s) for the event is determined by the Team Leader in consultation with the Team members and the Primary Contact Person for the community. A CPAT project will normally run between one and four consecutive days in the community. The Team Leader and the Primary Contact Person work together to lay out a specific schedule for each day of the event. It is the responsibility of the Primary Contact Person to provide the Team with background information before the event, to arrange for the Team’s meals and hotel accommodations (when necessary), to reserve a facility wherein the Team can work in private, and to schedule stakeholder interviews and community meetings during the event as requested by the Team.

The Team Leader will normally hold a conference call meeting of the Team before the event to clarify the purpose of the project, to agree upon a tentative work plan (including, where appropriate, a division of work responsibilities among Team members), and to finalize travel arrangements.

CONDUCT OF THE CPAT PROJECT WITHIN THE COMMUNITY:

The TEAM members meet in person for the first time when they arrive in the community on the first day of the event. Work begins immediately. The format is that of an intensive charette. Hours are often early in the morning to late in the evening. The Team binds together as a productive and creative unit. This is not to say that a CPAT project cannot include one or more social events, such as the Team checking out a local pub after a long day’s work, the Local Organizing Committee throwing a barbeque for the Team and community leaders one evening, or a celebration community picnic after the final presentation.

A typical CPAT project involves the following three phases:

Reconnaissance:

The Team must quickly become acquainted in depth with the community and develop an understanding of the issue(s) and all the factors affecting the issue(s). Reconnaissance normally involves a walking and/or motorized tour of the project area and surrounding areas (often guided by the Local Organizing Committee), one-on-one interviews with key stakeholders, contact with local, regional and/or State agencies which have a bearing on the project, and meeting(s) with the affected community (perhaps conducting a Strengths/Weaknesses/Opportunities/Threats exercise or a visioning session). The period of reconnaissance must be short (no more than one day for a four-day project), and its effectiveness is directly related to the degree of planning and scheduling which the Team Leader and Local Contact Person undertook prior to the event.

Analysis and Recommendations:

This is the real work of the Team, working as a whole and/or in sub-groups at the pace and intensity of a charette. No members of the community are present in this phase of the project, although the Primary Contact Person should be available by telephone to answer questions and to provide any needed resource material. It is the responsibility of the Team Leader to make sure that the work proceeds expeditiously and at the proper level of detail. He or she will direct the Team members to begin formulation of recommendations at the appropriate time, and all recommendations should represent a consensus among Team members.

Presentation of Findings and Recommendations:

The final phase is a presentation of the Team’s findings and recommendations to the community. This should normally be at a public meeting of the municipality’s City Council or of the community organization’s Board of Directors. Sufficient time must be set aside by the Team to prepare a clear and informative presentation. The Team Leader plays a key role in the presentation, but individual Team members should participate, as well. Power Point or other graphic means are utilized to make clear to the audience the Team’s findings and recommendations.

PREPARATION OF REPORT:

A written report is prepared following the event. A well-prepared presentation of findings and recommendations should provide the basic material needed to compile such a document. The Team Leader assigns responsibilities to individual Team members for various sections of the report, but one person, normally the Team Leader, assumes responsibility for final editing and production. The report is prepared in digital format; no printed copies are required. The report should be completed within 60 days of completion of the event in the community, and is forwarded to the community and to the PEN and APA California Boards. The report is preserved in the Chapter’s website file for the CPAT program.