

704

Title: EDS PLANNING MANUAL

by F.C. CUNY, FCA 1974  
*Prepared by C. Cuny & Associates*

A MANUAL FOR PREPARING ENVIRONMENTAL  
DESIGN SESSIONS FOR URBAN AREAS AND  
WATERSHEDS.

703

705

204/7

## EDS TRAINING MATERIAL

1. LECTURE (SEE LECTURE SEQUENCE)
2. UTR TAPE
3. AUDIO TAPES
4. GAMES Study
5. Bibliography
6. PLANNING BALANCE SHEET GUIDE
7. ATTITUDE INDEX Survey GUIDE
8. RECOMMENDED OCCUPATIONS GUIDE
9. RECOMMENDED PRESS RELEASES
10. RECOMMENDED SCHEDULE of EVENTS DATA FORM
- ✓ 11. RESEARCH GUIDE
- ✓ 12. Budget ITEMS
13. Consultants Budget
14. List of Available games

# PHASES OF DEVELOPMENT

EDS  
Phases of Development

- I. Programming: Progress Report Next Monday-Tuesday
- A. Complete Interviewing
  - B. Complete data gather
  - C. Develop profiles
    - 1. Identify Problems.
    - 2. Define Causes.
    - 3. Suggest Answers and Solutions.
  - D. Preliminary budget.
  - E. Work books
  - F. Press releases
  - G. Agency programs.
  - H. ~~From Gary~~ will:
    - 1. Outline EDS
    - 2. Develop budget
    - 3. Outline research
- Monday
- II. Design
- A. Set up tour - (Pts. of interest, schedule, transportation)
  - B. Full project timeline development
  - C. Profile of participants
  - D. Public relations - press release after participants are chosen, at least two weeks before EDS. Also, inform local government and community groups at least two weeks before EDS. Also, schedule orientation session 2-3 days before EDS.
  - E. Select date for participant debriefing (2 or 3 days after EDS).
  - F. Plan to institutionalize participants so they will remain as a concerned group after EDS.
  - G. Design elements of EDS
    - 1. Attitude index.
    - 2. Questionnaire for participants.
    - 3. Review game (~~Dirty Water~~) for Friday night.
    - 4. Planning Balance Sheet (Developed).
    - 5. Put together workbook.
      - a. Schedule
      - b. Introduction
      - c. List of people involved
      - d. Maps
      - e. Planning balance sheet
  - H. Packets - workbooks, pencils, pens, I.D. tags.
  - I. Master Packet for managers
    - 1. Extras of all materials
    - 2. Special Information
  - J. Train Monitors (1 full day).

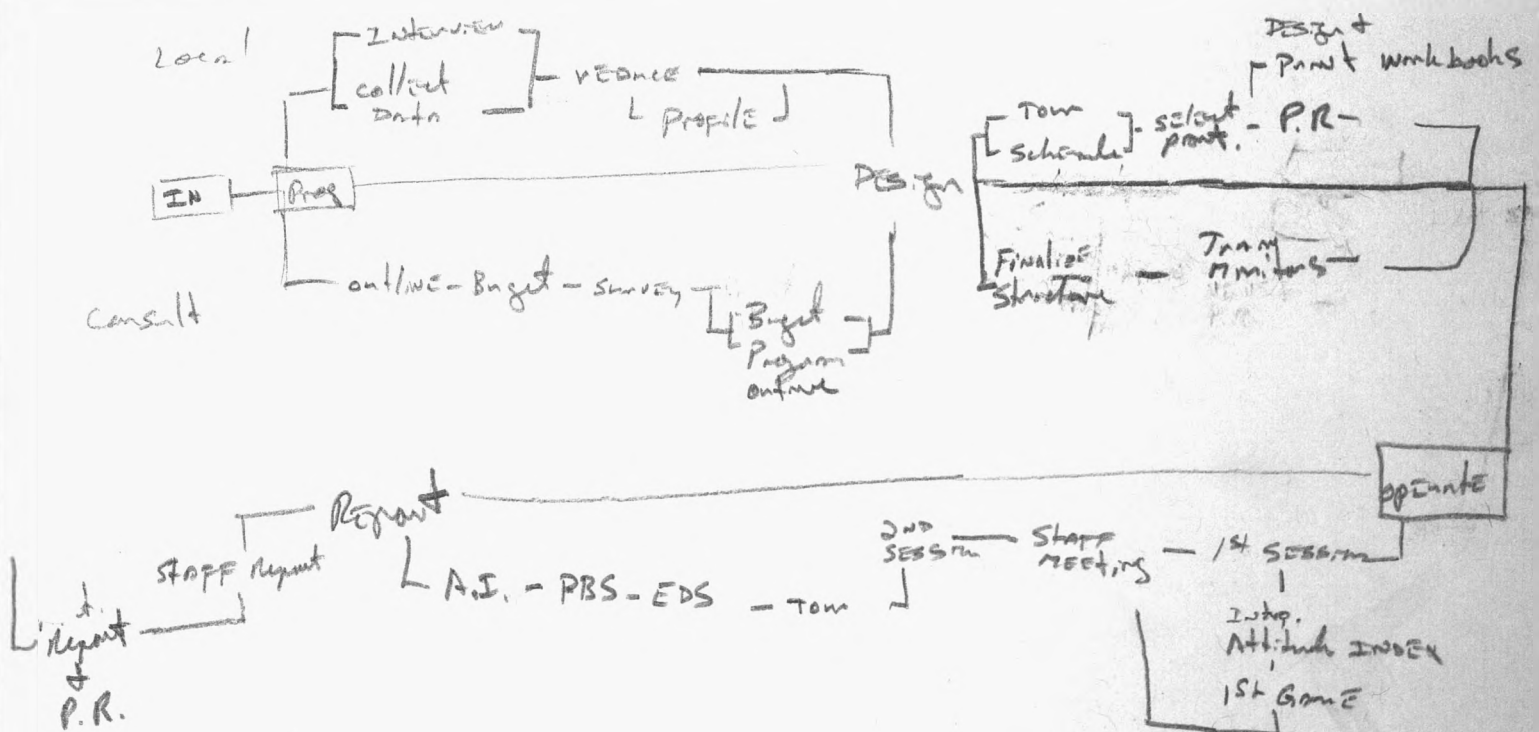
III. Operation

- A. Train Monitors *similar*
1. Familiarize ~~them~~ with ~~Cinty's Run~~ *Project Area*
  2. Review ~~Cinty's Run~~ problems.
  3. Discussion of how to handle sessions.
- B. Briefing night before EDS for agencies, organizations, clients, etc. *BEER!*
- C. Friday Night
1. Program outline, Introduction - No Slides.
  2. Get commitment for Saturday attendance
  3. Attitude index *GAME*
  4. Play ~~Dirty Water~~ until midnight
  5. Participants list problems of ~~Cinty's Run~~ *Project Area*
  6. Staff Meeting - discuss 5.
- D. Saturday night
1. 7:00 : Coffee - Start Tour
  2. Lunch
  3. Session
    - a. Problem identification
    - b. Problem listing
    - c. General discussion
    - d. Role playing
    - e. Preparation of comprehensive plan of area.
    - f. Listing of priorities
    - g. Financial considerations
  4. Planning balance sheet
  5. Attitude index
- ~~E. Sunday~~
- A. 10:00 A.M. Staff Meeting *DAY AFTER EDS***
- 1. Write narrative for participants.**
  - 2. Brief news media**
  - 3. Prepare outline of formal report.**
  - 4. *Tabulate Attitude Index + Planning Balance Sheets***
- IV. Report
- A.** EDS report to participants and their families.
  - B.** Present results to agencies - organization.
  - D.** Prepare recommendations for institutionalization of participants group.

# EDS PLANNING STEPS

- |   |              |  |
|---|--------------|--|
|   | ← Consultant | Local Group                            |
| 1. Initiate plan  |              | Contract consultant                    |
| 2. Budget, Prelim   | Set Goals    | collected data                         |
| 3. Survey Area<br>Prepare outline of EDS - Structure                    |              | Interviews in Area                     |
| 4. Budget, Final  |              | Select interviews                      |
| 5. Schedule of Events   |              | Program Profile of<br>cit. & community |
| 6. <del>conduct</del> <sup>input typical</sup> schedule of participants |              | Team selection                         |
| 7. Contact news media   |              |  |
| 8. recruit participants   |              |  |
| 9. Train team members   |              |  |
| 10. Conduct EDS 1st meeting   |              |  |
| 11. Staff meeting to review data  |              |  |
| 12. EDS +   |              |  |
| 13. Report  |              |  |

- ### Trips
1. Survey (3-5 days)
  2. Organizational (2 days)
  3. EDS (plus training) (5 days)
  4. Report (1-2 days)



4 groups

1. INDIC. -
2. Physical Sampling -
3. Govt. Agencies -
4. DEMAND ANALYSIS -

2ND TRIP (2 DAYS)

WEEK of 18 MARCH

WED. 4:00 to N.Y.C.

Friday in D.C.

@ D.C. Nat. Wetland

---

Show maps

- don't use beam-actric

---

## LECTURE SEQUENCE

1. Introduction
2. What is EDS?  
(brief explanation) *EDS J Approach*  
*why? - Traditional approaches*
3. Why a planning exercise?
  - A. Collapses time and space
  - B. View systems without trivia
  - C. Provides a standard of measurement of performance
  - D. Complements, does not replace normal citizen participation channels
4. Structure
  - A. Prior research
  - B. Develop and structure to retrieve data relevant to particular community
  - C. Elements
    - 1) Attitude Index
    - 2) Tour - Workbooks
    - 3) Sessions (explain role-playing structure - slides)
      - a) Review of tour
      - b) Problem discussion (from workbooks)
      - c) Role playing
      - d) Master plan preparation (brown paper)
      - e) Priorities
    - 4) Planning Balance Sheet
5. Analysis
  - A. Compare for commonality
  - B. Review for program compatibility
6. Where
  - A. Victoria, Texas
  - B. Bedford, Texas
7. Slide Presentation
  - A. Problem identification
  - B. Brown sheets



Budget

## EDS BUDGET

	<u>F.C. Cuny &amp; Asso.</u>	<u>Consultant Only</u>
1. <u>Travel</u> *		
Survey Trip @ \$100/day (3-5 days)	\$500	\$300
Organizational Trip @ \$100/day (2 days)	200	200
Session (plus training) " (5 days)	500	500
Report " (2 days)	200	200
2. <u>Printing</u>		
Workbooks	200	
News Releases	10	
Schedules	10	
Maps (2-color)	250	
Mylar Photos	150	
Planning Balance Sheets	20	
Attitude Indices	25	
Participants Lists	10	
Certificates	30	
Summary Report (illustrated)	500	
3. <u>Photos</u>		
Film, Polaroid	25	
Film, 35 mm. (slides, black & white)	25	
Film, 35 mm. (developing)	50	
Aerials	200	
4. <u>Equipment</u>		
Cameras (5 Polaroids)	100	
Autos @ \$40/day (5 days)	200	
Tape Recorders (rental)	75	
Cassettes	15	

	<u>F.C. Cuny &amp; Asso</u>	<u>Consultant Only</u>
5. <u>Supplies</u>		
Paper, pads, etc.	30	15
Pencils	2	
Pentels	10	
Markers	20	
Packets	5	
Manila Folders	5	5
Tabs	3	3
Name Tags	5	
File Box	5	5
File Cards	1	1
6. <u>Miscellaneous</u>		
Postage	30	30
Communications	100	100
Report Purchases	100	
7. <u>Office Time *</u>		
A. Preliminary		
Planner	600	250
Secretary	100	75
B. Research Phase		
Planner (1)	1200	450
Secretary	300	150
Consultant	300	100
C. Operational Phase		
Planner (s) (5)	1500	500
Secretary	300	100
Consultants	100	100
D. Report Preparation		
Planner (s)	600	300
Secretary	200	50

---

\* Does not include time on site

# Budget Items

## BUDGET ITEMS

### Environmental Design Session

1. Packets, Team Members
  - A. Workbook
    - 1) Worksheets \*
    - 2) Work maps \*
    - 3) Schedule \*
    - 4) Fact sheet \*
  - B. Name tag
  - C. Pentels, pencils (in pastel colors)
2. Packets, Team Monitor
  - A. Workbook
  - B. Name tags
  - C. Attitude Index, Part I, Part II \*
  - D. Planning balance sheets \*
  - E. Planning Maps
    - 1) Topographic map
    - 2) Land use map
    - 3) Zoning map
    - 4) Ecological map
    - 5) Proposed projects map
    - 6) Governmental jurisdiction map
    - 7) Others as appropriate
    - 8) Mylar or sepia prints of aerial photos of project area
  - F. Extra pencils, pentels, etc.
3. Team Materials and Equipment
  - A. Automobile (for four)
  - B. Tape recorder with cassettes
  - C. Polaroid camera with film
  - D. Master plan map
  - E. Brown paper
4. Organizational Materials
  - A. Medium-sized meeting area for first evening and report
  - B. Hotel rooms for sessions (should have telephone)

BUDGET ITEMS  
(continued)

- C. Press packet
  - 1) Press release \*
  - 2) Photos of project area
  - 3) Workbook sample
  - 4) List of participants \*
  - 5) Schedule of events \*
- D. Certificate of Appreciation for participants \* (see attached)
- E. Summary report (est. 50 pages)
- 5. Additional Costs
  - A. Film processing (slides of project area and photos for report)
  - B. Consultants
  - C. Transportation costs for low-income participants
- 6. Optional Items
  - A. Sack lunches
  - B. Coffee and/or soft drinks
  - C. Video tape equipment

---

\* Denotes items to be printed

CERTIFICATE

The City of Victoria, Texas and Carter and Burgess, Inc.

present this

# Certificate of Appreciation

to

---

IN RECOGNITION OF PARTICIPATION IN THE  
VICTORIA URBAN ENVIRONMENTAL DESIGN SESSION  
AND IN APPRECIATION OF INVOLVEMENT, AS A  
CITIZEN, IN THE PROBLEMS OF THE CITY OF  
VICTORIA, TEXAS

MAYOR

TEAM MONITOR



RESEARCH OUTLINE

## RESEARCH NEEDS FOR EDS

1. Basic Research
  - A. Reports
    - 1) Governmental agencies (city, county, state, federal, special districts, etc.)
    - 2) Semi-public agencies (non-profit foundations, chambers of commerce)
    - 3) Business groups (development committees)
    - 4) Industrial plans and reports
    - 5) News media studies and reports
    - 6) University/college studies
  - B. Statistics on project area
    - 1) Economic
    - 2) Demographic
    - 3) Tax data
    - 4) Bonding capacity of governmental agencies
  - C. Jurisdictional data
  - D. Physical Data
    - 1) Land use
    - 2) Topography
    - 3) Area conditions
    - 4) Special problems
    - 5) Zoning
    - 6) Ecological data
    - 7) Etc.
2. Program Research
  - A. Programs and projects currently under construction/proposed
  - B. Available programs
    - 1) Sources
      - a. Governmental agencies
      - b. Non-profit groups
      - c. Industrial sources
    - 2) Eligibility requirements
    - 3) Funding requirements (who participates and how much)
    - 4) Administration
    - 5) Applicability to project area
    - 6) Will it impose hardships on residents; if so, what?
  - C. Related programs
  - D. Proposed programs
  - E. Possibilities for demonstration project (experimental program)

RESEARCH NEEDS FOR EDS  
(continued)

3. Attitudinal Research

- A. Citizen perspectives (interviews)
- B. Group perspectives (interviews, news reports, letter contacts)
  - 1. Governmental agencies
  - 2. Business and industrial organizations
  - 3. Service and social clubs

# SCHEDULE OF EVENTS

## GUIDE TO PREPARATION OF THE PLANNING BALANCE SHEET

The purpose of the Planning Balance Sheet is to gain some insight into the thinking of various interest groups in the project area by introducing them to a range of development or redevelopment possibilities. The result of the process of the discussions and analysis of the options is a reduction of the alternatives to a set of priorities.

The PBS starts out as two pieces of blank paper. One is used to compare tangible planning factors and the other to compare intangible factors. The staff, through its interviews and research, identifies and analyzes the complete range of problems affecting the project area and identifies specific interest groups (such as residents, business, government). From this analysis, the problems are reduced to a problem list. The staff reviews the list to ensure that various items are not listed more than once under separate headings, then records the problems under specific headings on the sheet listing Tangible Factors and under general headings on the sheet for Intangible Factors. In general, Tangibles represent "brick and mortar" projects, those items that can actually be seen; and Intangibles represent "quality of life" aspects.

At this point, the staff makes a determination as to which type of PBS it wishes to utilize. There are three types of PBS that can be used with an EDS:

### Type 1

The first type of PBS utilizes the people in the project area to determine a general order of priorities before the EDS is conducted. A total of one hundred points is given to each sheet of the PBS. This total number is divided among the various interest groups according to a descending order, with residents receiving the highest number of points to use (e.g. residents in the project area, businesses in the project area, residents adjacent to the project area, businesses adjacent to the project area, local governmental agencies, state and federal agencies).

The sheets are then sent to each of the interest groups. Existing groups or organizations may have to be utilized, such as a residents' committee, a businessmen's organization or club, etc. Each group uses the total points assigned to it to set priorities. They may divide their total number of points among as many factors as they wish, and may assign as many points to any one factor as they desire, provided the total does not exceed the total points allowed.

Distribution of weights at this point is not a decision that is based upon strictly objective factors. It leaves room for bias, maneuver, or political or financial clout. On the other hand, there is one powerful self-correcting factor; the entire process is open. Everyone involved knows how the weights have been distributed, both among the interest groups and by each group, and all are invited to make comments.

Once the points have been assigned by each group, they are averaged together and entered on column two of the Master PBS (see sample PBS sheets). This average becomes the Community Factor.

In the Environmental Design Session, each team is asked to rate each item or factor on a scale of 1-5, with one indicating low and five indicating high desirability. The participants have the option of either doing the PBS individually and averaging their points to produce a team rating, or discussing the factors and assigning their rating as a team. In either case, the team rating is the objective.

Following the EDS, the monitors multiply the team rating by the Community Factor, and the total number of points determines the priorities.

#### Type II

The second type of PBS utilizes the same procedure during the EDS to determine the priorities, but the Community Factor is determined by the staff, not the interest groups.

Once the problems have been identified and placed on the two balance sheets, the staff divides the total of 100 points and assigns weights to the items according to the perceived priority of identified interest groups in descending order as in Type I. As in the first type, these weights are averaged to determine the Community Factor. Following the EDS, the rating assigned by the teams is multiplied by the Community Factor to get the total weight and priorities are determined by the scores.

#### Type III

The third type PBS is the simplest to utilize but determines only the priorities of the participants. As in the first two types, the staff identifies problems and lists them on the two sheets as either Tangible or Intangible Factors. The staff then rates the problems on the basis of the information they have obtained and categorizes the desirability or acceptability of each as high, medium or low, and enters their evaluation on the Master PBS Sheet for staff reference only.

In the EDS, upon completion of the general discussions of each team, the balance sheets are passed out to the participants. A total of 100 points \* is allowed each team for sheet #1 (Tangibles) and 80 points for sheet #2 (Intangibles). No item may be assigned more than ten points. The team has the option of individually rating each item and assessing an average weight or may assign weights as a group. The team does not have to use its entire allotment of points but may not exceed that number. Problems are normally listed under various categorical headings, but the categories are not assigned weights and points may be shifted between categories or items as long as the total for any item does not exceed ten points. In general, team members should be encouraged to discuss Tangible Factors as items they are willing to pay for, but Intangible Factors should not be discussed in terms of cost.

---

\* Total number of points may vary depending on number of factors listed.

Following the EDS, the team points are averaged for each item and the highest scores represent the priorities. The staff then analyzes the priorities established by each team with the priorities determined earlier to compare whether or not the staff's ideas relating to the project area are in concert with the priorities established by the participants. This latter exercise is merely for internal use to see if the staff's concepts of problems and priorities previous to the EDS were in line with those of the participants.

1. Staff identifies problems from research and interviews.
2. Staff lists problems on sheets as either Tangible or Intangible Factors.
3. Sheets are sent to interest groups.
4. Groups assign priority to problem areas according to points allowed them by staff.
5. Points are averaged to determine Community Factor and recorded on Master PBS Sheet.
6. In EDS, participants/teams assign priority on 1-5 rating scale for each problem. The total number of points is limited so that an even distribution of points is impossible.
7. Staff multiplies the rating assigned by team by Community Factor to get total weight.
8. Priorities are determined by final weights.

Advantages:

- 1) Interest groups participate at all levels in determining priorities.
- 2) Correlates desires of EDS team members with community-at-large.

Disadvantages:

- 1) No check on staff perspectives of pre-EDS perceived citizen priorities.
- 2) Time necessary to prepare PBS increases significantly.
- 3) Difficult to ascertain that all viewpoints of each interest group are accurately represented in pre-EDS phase.

1. Staff identifies problems from research and interviews.
2. Staff lists problems on sheets as either Tangible or Intangible Factors.
3. Staff assigns points to problems based on perceived priorities of identified interest groups with points allotted according to type of group.
4. Points are averaged to determine Community Factor and recorded on Master Sheet.
5. Teams assign priority on 1-5 rating scale for each problem. The total number of points is limited so that an even distribution of points is impossible.
6. Staff multiplies the rating assigned by team by Community Factor to get total weight.
7. Priorities are determined by final weights.

Advantages:

- 1) Allows staff to check pre-EDS conceived priorities.
- 2) Preparation time is short.
- 3) Allows for synthesis of problems by outside party.

Disadvantages:

- 1) Staff's selection of Community Factor may not be accurate.
- 2) Does not allow for pre-EDS participation of interest groups.

1. Staff identifies problems from research and interviews.
2. Staff lists problems on sheets as either Tangible or Intangible Factors.
3. Staff rates problems on basis of high, medium, low desirability; tabulates results on Master Sheet for staff reference.
4. Teams assign priority to each factor with no factor receiving more than 10 points.
5. Priorities are determined by averaging the points assigned each factor by each team.
6. Staff compares priorities with those rated by staff.

Advantages:

- 1) Simple, easy to use.
- 2) Only limited post-EDS tabulation necessary.
- 3) Can be used to check staff's pre-EDS perception of problems and priorities.

Disadvantages:

- 1) Does not allow for pre-EDS participation of interest groups.
- 2) Shows only EDS participants' priorities.



PLANNING BALANCE SHEET GUIDE

The last two pages of the workbook contain the planning balance sheets. The two sheets, listing Tangible and Intangible Factors, will be used to provide a numerical evaluation and priority rating of the various plans and projects discussed in the EDS.

Only upon completion of the general discussions of each group are the balance sheets to be used; however, to prepare the participants for using the sheets, the team monitor should guide the team's discussion using the phraseology on the sheets.

Sheet No. 1 represents Tangible Factors, or those items which a community can see on the ground (i.e. brick and mortar). In general terms, these items will require the community to commit monies in order to attain them. The cost/benefit relationship should be stressed on Sheet No. 1. A total of 100 points is allowed each team. No item may be assigned more than 5 points. Team members should collectively assign weights to those items they deem important and which they are willing to pay for. It should be stressed that the numbers will represent priorities. The team does not have to use its entire 100 points, but may not exceed that number. Categories have not been assigned weights and points may be shifted between categories or items as long as the total for any item does not exceed 5 points.

Sheet No. 2 represents the Intangible Factors, or those which are not directly measurable in brick and mortar. A total of 80 points has been assigned to each team for this sheet. Again, no item may receive more than 5 points. In general, team members should be steered away from discussing these in terms of cost.

Upon completion of the Planning Balance Sheets, monitors should move along to the Attitude Index, Part II.

INTANGIBLE FACTORS

	1) Rating	2) Community Factor	3) Team Ave.	4) Total Weight
Residential Density				
Housing Variety				
Access and Mobility				
Job Accessibility				
Environmental Quality				
Educational Opportunities				
Economic Stability and Expansion				
Economic Skills				
Public Protection				
Social Balance				
Increased City Services				
Racial Balance				
Citizen Participation				
Political Unity				
Community Identity				
Timing, Urgency				
Urban Environment				
Diversified Citizenry				
Environmental Protection				
Administrative Access				
Governmental Efficiency				
Recreational Diversity				
Balanced Land Uses				
Compliance with City Codes				
Eliminate Social Problems				
Balanced City Budget				

TANGIBLE FACTORS

	1) Rating	2) Community Factor	3) Team Ave.	4) Total Weight
<u>Environmental Quality</u>				
Health				
Pollution Control				
Flood Control				
<u>Educational Facilities</u>				
Pre-School Facilities				
Elementary Facilities				
High School Facilities				
Higher Education Facilities				
<u>Housing</u>				
Single-Family Housing				
Duplex Housing				
Multi-Family Housing				
Public Housing				
Cooperative Housing				
<u>Transportation Facilities</u>				
Inner City Transportation				
Intra-City Transportation				
Airports				
<u>Recreational Facilities</u>				
Neighborhood Parks				
Greenbelts				
Tourist Facilities				
Commercial Recreation				
<u>Shopping Facilities</u>				
Strip Commercial				
Neighborhood Shopping Areas				
Regional Shopping Centers				
Shops in Home				
<u>Job Sources (New)</u>				
Industrial				
Retail				
White Collar				
Professional				
<u>Utilities</u>				
Street Lighting				
Sanitary Sewer				
Solid Waste				
Water				
Electrical				
<u>Community Facilities</u>				
Convention Center				
Multi-use Center				

PLANNING BALANCE SHEET GUIDE

The last two pages of the workbook contain the planning balance sheets. The two sheets, listing Tangible and Intangible Factors, provide a numerical evaluation and priority rating of the various plans and projects discussed in the EDS.

Only upon completion of the general discussions of each group are the balance sheets to be used; however, to prepare the participants for using the sheets, the team monitor should guide the team's discussion using the phraseology on the sheets.

Sheet No. 1 represents Tangible Factors, or those items which a community can see on the ground (i.e. brick and mortar). In general terms, these items will require the community to commit monies in order to attain them. The cost/benefit relationship should be stressed on Sheet No. 1. A total of 100 points is allowed each team for Sheet No. 1 (Tangibles). No item may be assigned more than 10 points. Team members should collectively assign weights to those items they deem important and which they are willing to pay for. Monitors should stress that the numbers will represent priorities. The team does not have to use its entire 100 points, but may not exceed that number. Categories have not been assigned weights and points may be shifted between categories of items as long as the total for any item does not exceed 10 points.

Sheet No. 2 represents the Intangible Factors, or those which are not directly measurable in brick and mortar. A total of 80 points has been assigned to each team for this sheet. Again, no item may receive more than 10 points. In general, team members should be steered away from discussing these in terms of cost.

Upon completion of the Planning Balance Sheets, monitors should move along to the Attitude Index, Part II.

TANGIBLE FACTORS

	1) Rating	2) Do Not Write in This Col.
<u>Educational Facilities</u>		
Secondary		
Vocational		
Higher Education		
<u>Housing</u>		
Single-Family		
Multi-Family		
<u>Transportation Facilities</u>		
Inner City		
Intra-City		
<u>Recreational Facilities</u>		
Open Space		
Tourist		
<u>Shopping Facilities</u>		
Neighborhood		
Regional		
<u>Job Sources (New)</u>		
Industrial		
Retail		
White Collar		
Professional		
<u>Utilities Expansion</u>		
Sanitary Sewer		
Solid Waste		
Water		
<u>Tourist-Convention Facilities</u>		
<u>Environmental Quality</u>		
(Health, Pollution Control, etc.)		

INTANGIBLE FACTORS

	1) Rating	2) Do Not Write in This Col.
Residential Density		
Housing Variety		
Access and Mobility		
Job Accessibility		
Environmental Quality		
Educational Opportunities		
Economic Stability and Expansion		
Economic Skills		
Public Protection		
Social Balance		
Increased City Services		
Racial Balance		
Citizen Participation		
Political Unity		
Community Identity		
Timing, Urgency		

## PLANNING BALANCE SHEET GUIDE

The last two pages of the workbook contain the planning balance sheets. The two sheets, listing tangible and intangible factors, will provide the Capital Improvements Program with direct input from the Environmental Design Session. The balance sheet technique will be used to provide a numerical evaluation and priority rating of the various plans and projects discussed in the EDS.

Only upon completion of the general discussions of each group are the balance sheets to be used; however, to prepare the participants for using the sheets, the team monitor should guide the team's discussion, using the phraseology on the sheets.

Sheet No. 1 represents tangible factors, or those items which a community can see on the ground (i. e. brick and mortar). In general terms, these items will require the community to commit monies in order to attain them. The cost/benefit relationship should be stressed on sheet one.

A total of 100 points is allowed each team for Sheet No. 1 (Tangibles). No item may be assigned more than 10 points. Team members should collectively assign weights to those items they deem important and which they are willing to pay for. Monitors should stress that the numbers will represent priorities. The team does not have to use its entire 100 points, but may not exceed that number. Categories have not been assigned weights and points may be shifted between categories or items as long as the total for any item does not exceed 10 points.

Sheet No. 2 represents the intangible factors, or those which are not directly measurable in brick and mortar. A total of 80 points has been assigned to each team for this sheet. Again, no item may receive more than 10 points. In general, team members should be steered away from discussing these in terms of cost.

Upon completion of the planning balance sheets, monitors should move along to the Attitude Index, Part II.

INTANGIBLE FACTORS

	Weight	Do Not Write In This Col.		
Residential Density				
Housing Variety				
Access and Mobility				
Job Accessibility				
Environmental Quality				
Educational Opportunities				
Economic Stability and Expansion				
Economic Skills				
Public Protection				
Social Balance				
Increased City Services				
Racial Balance				
Citizen Participation				
Political Unity				
Community Identity				
Timing, Urgency				



INTANGIBLE FACTORS

	BEDROOM	RETAIL	IND./MAN.	TRANS.
Residential Density	L	H	H	M
Housing Variety	L	H	M	H
Access and Mobility	H	H	H	H
Job Accessibility	M	M	M	H
Environmental Quality	M	M	M	M
Educational Opportunities	M-H	M	H	M
Economic Stability and Expansion	L	H	H	L
Economic Skills	H	M	H	M
Public Protection	L	H	H	H
Social Balance	L	M	M	H
Increased City Services	L	M	H	M
Racial Balance	L	L	M	L-M
Citizen Participation	L	L	M	M
Political Unity	M	L	H	M
Community Identity	H	L	L	M
Timing, Urgency	M	M	H	M

TANGIBLE FACTORS

	BEDROOM	RETAIL	IND./MAN.	TRANS.
<u>Educational Facilities</u>				
Secondary	H	M	M-H	H
Vocational	L	M	H	H
Higher Education	M	L	L	M
<u>Housing</u>				
Single-Family	H	M	M	M
Multi-Family	L	H	H	M
<u>Transportation Facilities</u>				
Inner City	M	M	H	M
Intra-City	H	M	H	H
<u>Recreational Facilities</u>				
Open Space	H	L-M	L	M
Tourist	L	H	L	M
<u>Shopping Facilities</u>				
Neighborhood	H	H	M	M
Regional (HEB)	M	H	H	H
<u>Job Sources (New)</u>				
Industrial	L	H	H	M
Retail	M	H	L	M-H
White Collar	M	M-H	M	M
Professional	H	H	L-M	M
<u>Utilities Expansion</u>				
Sanitary Sewer	M-H	M	H	M
Solid Waste	H	M	H	H
Water	H	M	H	M
<u>Tourist-Convention Facilities</u>				
	L	H	M	H
<u>Environmental Quality</u> (Health, Pollution Control, etc.)				
	M-H	M	M	M

FREDERICK C. CUNY & ASSOCIATES

**INTERTECT**

Box 10502

Dallas, Texas 75207

Tel: (214) 522-8740

March 26, 1974

Mr. Jeff Ganek  
Project Coordinator  
Girty's Run Project  
School of Urban & Public Affairs  
Carnegie-Mellon University  
Schenley Park  
Pittsburgh, Pennsylvania 15213

Dear Jeff:

Enclosed is the guide to preparation of the Planning Balance Sheet. There are three types of PBS which can be used with the EDS, and you should review the guide and select whichever seems most suitable for the Girty's Run project.

If you have any questions, please feel free to call me.

Yours truly,



Frederick C. Cuny

FCC:jwp

Encl.

PROGRAMMING REVIEW

1. Review of data:
  - a. Report on data from notebook
  - b. Student report
    - 1) Availability
    - 2) Access
    - 3) Relevancy (use card index)
  - c. Maps
2. Problem Identification:
  - a. Problem lists (review)
  - b. Problem - Cause - Priorities
  - c. Problem groupings
    - 1) Group by area
    - 2) Group by nature
    - 3) Group by programs
3. Program Identification:
  - a. Discussion of problems - Questions from team
  - b. Discussion of agencies
4. Discussion of Goals

DESIGN PHASE  
First Staff Meeting

1. Discussion of Goals
2. Discussion of data we hope to retrieve
3. Review of possible EDS elements
4. Selection of general structure - Discussion of alternatives
5. Selection of specific elements:
  - a. Attitude Index
  - b. Game
  - c. Tour
  - d. Session (outline workbooks, brown sheets, etc.)
  - e. Planning balance sheets
6. Make element assignments to staff
7. Discussion of means to implement/institutionalize results of EDS

DATA REVIEW

TITLE:

AUTHOR:

SOURCE:

CONTENTS (Description):

COMMENTS:

CONTENT RATING:

High

Medium

Low

AGENCY INTERVIEW

Agency: \_\_\_\_\_

PROBLEM:

CAUSES:

RECOMMENDED APPROACH(ES):

PROGRAMS:

ESTIMATED COST:

PRIORITY (Rate Highest, High, Medium, Low):

PROBLEM IDENTIFICATION

(Staff)

PROBLEM:

CAUSE(S):

RECOMMENDED APPROACH:

PROGRAMS:



INTERVIEW WITH \_\_\_\_\_

DATE: \_\_\_\_\_

PROBLEM:

CAUSE(S):

APPROACH:

RECOMMENDED OCCUPATIONS OF TEAM PARTICIPANTS

TEAM # 1

1. Teacher (history or civics teacher preferred)
2. Businessman (longtime resident of city)
3. Local Government Employee (someone involved in long range planning, streets, sewer, etc.)
4. Developer (not associated with local government)
5. Housewife (should be under 25 years old)

TEAM # 2

1. Minority Group Member - Negro ) One of these should be under 25 years old.
2. Minority Group Member - Mexican American )
3. Citizen Employed by large Industry (Alcoa or Dupont) (Should be a professional)
4. Businessman - From CBD
5. Local Government Employee (should be involved in management)
6. Laborer - (organized union labor)

TEAM # 3

1. Developer
2. Local Government Employee (someone involved in planning)
3. Minority Group Member
4. Citizen Employed by large Industry (should be involved in industrial planning, expansion, etc.)
5. Businessman (from outlying shopping center)

TEAM # 4

1. County Official (under 25 years old if possible)
2. Representative of Transportation Industry (airport, truck lines, etc.)
3. Industrial Employee - (should be under 25 years old)
4. Farmer
5. Citizen at large

Each team member should provide a sack lunch and transportation to and from the meeting place (probably a local motel on Highway 59). Teams will leave the starting point promptly at 8:00 a.m. Saturday morning and be finished at 5:00 p.m. the same day.

## VICTORIA ENVIRONMENTAL DESIGN SESSION SCHEDULE OF EVENTS

The Victoria Environmental Design Session is a comprehensive citizen examination of the City of Victoria, its recent growth, its physical and social problems, and its future physical growth potential. As a selected group of individuals representing all walks of life, you will meet in concentrated work sessions for the next two days to identify and describe the problems of Victoria and to make recommendations for alleviating them.

Twenty-five participants have been selected from volunteers recruited by the City and Planning Commission. Four teams will be composed and assigned to examine certain areas of the city from different time perspectives. A team monitor from Carter & Burgess, Inc., the city's consultants, will accompany each team and evaluate and compile the results of each team's work.

Friday evening, each team will meet with the team monitor. A brief instructional period will be held and a kit of materials will be passed out to each participant. Following a question and answer period, the first part of an attitude index test will be given by the team monitor.

Saturday morning at 7:30 a.m., teams will assemble in the coffee shop of the Holiday Inn. At 8:00 a.m. each team will begin an intensive, four-hour inspection tour of their assigned areas. The tours are planned so as to provide an in-depth look at the problems confronting each area.

Following the inspection tours, the teams will return to a local restaurant where we will be the guests of the Mayor for lunch. Arrangements have also been made for the teams to watch the Arkansas-Texas football game. At approximately 4:00 p.m. the teams will assemble in suites at the Holiday Inn and the remainder of the

day will be spent exploring the problems of the city, recommending programs and projects, and, in effect, preparing a mock plan for the part of the city assigned to each group. Team monitors will tape the sessions, take notes on problems and causes, and aid the teams in preparing their overall plans. At the end of the session, the participants will be given the second part of the Attitude Index.

On Sunday, the team monitors will gather the various plans together and prepare an evaluation of each team effort. A critique reflecting the total effort will be compiled. Results of the Attitude Index will also be prepared.

At 3:00 p.m. Sunday the critique will be presented to the participants in a meeting, open to the public, at the Council Chamber of City Hall. A formal report to the Mayor's Citizen Advisory Committee and the Planning Commission will follow at a later date.

The purpose of the design sessions is two-fold - to acquaint a cross section of citizens with the problems of the city and the planning tools available to correct them, and to give the planners a chance to view the perspectives, aspirations and desires of the community's residents. Thus the session will provide the planners with a direct citizen input in the final preparation of the Master Plan.

HOW DO YOU SEE THE CITY? - PART 1

Please join us in a challenging and important social research project - an experiment in two-way communication with the participants in the Victoria Urban Environment Design Series. Your opinions and attitudes will count and help open the dialogue between the evaluators of this project and the participants. This will give us an important measure of your attitudes and how they change over a period of time. Please do not fill in your name, just let honesty and anonymity be synonymous.

To participate, answer questions by circling the appropriate numbers below the question and returning it to the monitor at the end of the period.

1. Some people claim that Victoria is in serious trouble, with the situation worsening. Others believe that there are no serious problems or that existing problems will correct themselves soon. How serious do you think the situation is in your city?
  1. Very serious trouble.
  2. Some trouble - fairly serious.
  3. Some trouble - not very serious.
  4. No trouble worth worrying about.
  5. Don't know.
  
2. How do you think the quality of living in your city today is compared with what it was twenty years ago.
  1. Much better.
  2. Somewhat better.
  3. About the same.
  4. Somewhat worse.
  5. Much worse.
  
3. How important to you personally is the situation in Victoria?
  1. Very important.
  2. Somewhat important.
  3. Not important.
  
4. How much do you think white racial attitudes are to blame for the city's problems?
  1. Very much to blame.
  2. Somewhat to blame.
  3. Not to blame.
  4. Don't know.

5. Which of the following do you think would have the greatest effect in reducing racial prejudice in Victoria?
  1. Equalization of races in public schools.
  2. Publicity campaigns to promote integration in housing.
  3. Fair employment.
  4. Direct personal contact between members of the various racial groups.
6. How much do you think the present system of property taxes is to blame for the city's slums?
  1. Very much to blame.
  2. Somewhat to blame.
  3. Not to blame.
  4. Don't know.
7. In your opinion, where should funds for rebuilding and renewing your city come from?
  1. Wholly federal sources.
  2. Mostly federal, partly state and local.
  3. Equally divided - federal, state and local.
  4. Mostly or entirely local.
  5. Depends on circumstances.
8. The state's share in rebuilding cities currently is very small. How much of the burden should the states bear?
  1. Major portion.
  2. Match federal grants to cities.
  3. Depends on local circumstances.
  4. Less than federal or local.
  5. None at all.
9. How much money should be spent on improving your city in the next ten years?
  1. Less than \$1,000,000.
  2. \$1,000,000 to \$5,000,000.
  3. \$5,000,000 to \$10,000,000.
  4. \$10,000,000 to \$20,000,000.
  5. More than \$20,000,000.

10. What do you think is the primary reason for the tendency to shift responsibility for health, education and welfare services from the local level to the federal level?
  1. The majority of city residents desire this shift.
  2. Federal administration of such programs is generally much more efficient.
  3. There has been a failure to organize local government so that it is capable of directing such programs.
  4. The cost of such programs has become so great that urban areas cannot afford to support them by themselves.
  
11. How much do you think lack of employment opportunities for minority groups is to blame for current city problems?
  1. Very much to blame.
  2. Somewhat to blame.
  3. Not to blame.
  4. Don't know.
  
12. How important do you think pollution is as a local problem?
  1. Very important.
  2. Somewhat important.
  3. Not important.
  4. Don't know.
  
13. What effect do you think liberalized welfare programs will have on improving conditions in Victoria?
  1. Very positive effect.
  2. Somewhat positive effect.
  3. No important effect.
  4. Somewhat negative effect.
  5. Very negative effect.
  
14. What effect would zoning legislation have on solving housing problems?
  1. Very positive.
  2. Somewhat positive.
  3. No important effect.
  4. Somewhat negative.
  5. Very negative.

15. What effect do you think more forceful land control measures would have?
1. Very positive.
  2. Somewhat positive.
  3. No important effect.
  4. Somewhat negative.
  5. Very negative.
16. How much do you blame housing problems on the apathy of the slum dweller?
1. Very much to blame.
  2. Somewhat to blame.
  3. Not to blame.
  4. Don't know.
17. In general, how would you rate current welfare systems?
1. Much too lenient.
  2. Somewhat too lenient.
  3. Not lenient, but fair.
  4. Somewhat too strict.
  5. Much too strict.
18. How much do you think racial discrimination in selling and renting housing is to blame for housing problems?
1. Very much to blame.
  2. Somewhat to blame.
  3. Not to blame.
  4. Don't know.
19. How much has the exodus of businesses from city centers to suburbs contributed to the city's problems?
1. Very much.
  2. Somewhat.
  3. Not much.
  4. Don't know.



20. How successful do you think federally sponsored urban renewal programs have been up to now?
1. Very successful.
  2. Somewhat successful.
  3. Somewhat unsuccessful.
  4. Very unsuccessful.
  5. Don't know.
21. How much of the city's problems do you think is due to middle class indifference?
1. Very much.
  2. Some.
  3. None.
  4. Don't know.
22. Local governments often are criticized as being outmoded because of political incapacity to act on urban problems. How much do you think reforms to city government are needed?
1. Very much.
  2. Somewhat.
  3. Not at all.
  4. Don't know.
23. How would you feel about your children attending a school over half of whose pupils were of another racial group?
1. Wouldn't mind.
  2. Wouldn't like it.
  3. Depends on the circumstances.
24. How much do you feel about a member of the other racial group living in the house or apartment next to yours?
1. Wouldn't mind.
  2. Wouldn't like it.
  3. Depends on circumstances.
25. How would you feel about a member of another racial group being your immediate superior in a work situation?
1. Wouldn't mind.
  2. Wouldn't like it.
  3. Depends on circumstances.

To evaluate this survey, it is important to know a few things about the background of each person who responds. Please help by answering these items, please do not sign your name.

A. To what racial group do you belong?

1. White.
2. Mexican-American.
3. Negro.
4. Other.

B. What is your sex?

1. Male.
2. Female.

C. What is your age?

1. Under 25.
2. 25 to 34.
3. 35 to 44.
4. 45 to 59.
5. 60 and over.

D. What area of the country were you born in?

1. West.
2. Southwest and Mountain States.
3. Midwest.
4. South.
5. New England and Middle Atlantic.

E. What level of education have you completed?

1. High school graduate.
2. College graduate.
3. Some graduate school.
4. Advanced degree.

F. What is your approximate annual income?

1. Less than \$4,000 per year.
2. \$4,000 to \$10,000.
3. \$10,000 to \$15,000.
4. \$15,000 to \$25,000.
5. More than \$25,000.

G. How would you rate, in general, your political views and beliefs.

1. Very liberal.
2. Somewhat liberal.
3. Moderate.
4. Somewhat conservative.
5. Very conservative.

H. What is your present occupation?

1. Educator.
2. Housewife.
3. White collar, clerical or sales.
4. Technician, craftsman, etc.
5. Laborer.
6. Business manager or executive.
7. Government official.
8. Other white collar or professional.

I. What local medium do you think provides the most reliable information on the city's problems?

1. Newspapers.
2. Radio.
3. Television.
4. Magazines.
5. Books.

HOW DO YOU SEE THE CITY? - PART II

Answer the following questions by circling the appropriate numbers below:

1. Some people claim that Victoria is in serious trouble, with the situation worsening. Others believe that there are no serious problems or that existing problems will correct themselves soon. How serious do you think the situation is in your city?
  1. Very serious trouble.
  2. Some trouble - fairly serious.
  3. Some trouble - not very serious.
  4. No trouble worth worrying about.
  5. Don't know.
  
2. How important to you personally is the situation in Victoria?
  1. Very important.
  2. Somewhat important.
  3. Not important.
  
3. How much do you think the present system of property taxes is to blame for the city's slums?
  1. Very much to blame.
  2. Somewhat to blame.
  3. Not to blame.
  4. Don't know.
  
4. In your opinion, where should funds for rebuilding and renewing your city come from?
  1. Wholly federal sources.
  2. Mostly federal, partly state and local.
  3. Equally divided - federal, state and local.
  4. Mostly or entirely local.
  5. Depends on circumstances.

5. How much money should be spent on improving your city in the next ten years?
  1. Less than \$1,000,000.
  2. \$1,000,000 to \$5,000,000.
  3. \$5,000,000 to \$10,000,000.
  4. \$10,000,000 to \$20,000,000.
  5. More than \$20,000,000.
  
6. How much do you think lack of employment opportunities for minority groups is to blame for current city problems?
  1. Very much to blame.
  2. Somewhat to blame.
  3. Not to blame.
  4. Don't know.
  
7. How important do you think pollution is as a local problem?
  1. Very important.
  2. Somewhat important.
  3. Not important.
  4. Don't know.
  
8. What effect would zoning legislation have on solving housing problems?
  1. Very positive.
  2. Somewhat positive.
  3. No important effect.
  4. Somewhat negative.
  5. Very negative.
  
9. What effect do you think more forceful land control measures would have?
  1. Very positive.
  2. Somewhat positive.
  3. No important effect.
  4. Somewhat negative.
  5. Very negative.

10. How much do you blame housing problems on the apathy of the slum dweller?
1. Very much to blame.
  2. Somewhat to blame.
  3. Not to blame.
  4. Don't know.
11. How much do you think racial discrimination in selling and renting housing is to blame for housing problems?
1. Very much to blame.
  2. Somewhat to blame.
  3. Not to blame.
  4. Don't know.
12. How much has the exodus of businesses from city centers to suburbs contributed to the city's problems?
1. Very much.
  2. Somewhat.
  3. Not much.
  4. Don't know.
13. How successful do you think a federally assisted housing program would be?
1. Very successful.
  2. Somewhat successful.
  3. Somewhat unsuccessful.
  4. Very unsuccessful.
  5. Don't know.
14. Local governments often are criticized as being outmoded because of political incapacity to act on urban problems. How much do you think reforms to city government are needed?
1. Very much.
  2. Somewhat.
  3. Not at all.
  4. Don't know.

Sample Press Release #1

### Planning Implemented in Bedford

An innovative part of the comprehensive plan for the City of Bedford will be implemented in an Environmental Design Session this weekend. The session is that part of the city's comprehensive plan calling for broad spectrum citizen participation in the ongoing process of planning.

Bedford, through its planners from the firm of Carter & Burgess, will conduct this citizen planning session to find out what the people of Bedford want in their rapidly changing future. Participants have been selected by the city to represent all segments of the community. They will meet in three work sessions beginning Friday.

In this implementation of the first stages of the city's comprehensive plan and in calling for citizen participation, Bedford continues to show its commitment to planning to meet the fast pace of change that has come to the community.

---

The next press release would follow by one or two days and should detail the people involved and some of the process--still emphasizing participation and process of planning.

TANGIBLE FACTORS

	Weight	Do Not Write In This Col.		
<u>Educational Facilities</u>				
Secondary				
Vocational				
Higher Education				
<u>Housing</u>				
Single-Family				
Multi-Family				
<u>Transportation Facilities</u>				
Inner City				
Intra-City				
<u>Recreational Facilities</u>				
Open Space				
Tourist				
<u>Shopping Facilities</u>				
Neighborhood				
Regional (HEB)				
<u>Job Sources (New)</u>				
Industrial				
Retail				
White Collar				
Professional				
<u>Utilities Expansion</u>				
Sanitary Sewer				
Solid Waste				
Water				
<u>Tourist-Convention Facilities</u>				
<u>Environmental Quality</u> (Health, Pollution Control, etc.)				



RECOMMENDED Letter to TEAM Participants  
From TEAM Monitor. SEND 1 week prior to 1st session.

Dear \_\_\_\_\_

Welcome to Team Number Four, the Bedford Environmental Design Session. As the team monitor, I will assist you and your fellow team members in the various phases of the design session, or as we call them EDS. You are probably wondering exactly what the EDS is, and what you as a participant are expected to do. While the details will be fully explained at the Friday evening meeting, let me say this: The EDS is an adaptation of the "Think Tank" approach utilized by business for determining problems and predicting future needs for large corporations. Our firm has expanded the approach and tailored it to the process of <sup>urban + regional</sup> city planning. With the assistance of the monitors, the various teams will examine the city and the problems which confront the community as it expands into one of the most dynamic regional areas of the United States. Our team will be particularly concerned with the quality of the <sup>city</sup> (urban) environment in Bedford and will determine which steps need to be undertaken in order to insure that all citizens, now and in the future, continue to have a decent, safe environment in which to live.

The various sessions will be strictly informal, and you should feel free to dress as comfortably as you wish. Your family and friends are welcome to observe at the Friday evening session and at the critique the following Tuesday. The Saturday session, however, will be closed, and only the team members may attend.

The Saturday session will be an all-day affair. All the materials needed for the session will be furnished by <sup>the</sup> ~~the~~ monitors (and the city will provide lunch and snacks.) In case an emergency arises, you may be reached at the Western Hills Inn on Highway 183.

Enclosed is a revised schedule of events. We are looking forward to an exciting and productive weekend and appreciate your taking part in the project. Should you have any questions about the Environmental Design Session, or should anything arise which would prohibit your participation in any of the sessions, please feel free to call on me or Bob Blevins, the City Manager.

Thanking you again for your participation, I am

Yours truly,

~~CARTER & BURGESS, INC.~~ FREDERICK C. CUNY AND ASSOC.

~~Frederick C. Cuny~~ (NAME)

~~TEAM Monitor~~

~~FCC/mto~~  
Encl.

REVISED SCHEDULE OF EVENTS

BEDFORD ENVIRONMENTAL DESIGN SESSION

<u>Time</u>	<u>Day</u>	<u>Date</u>	<u>Place</u>	
7:30 p.m.	Friday	February 26, 1971	City Hall	Session I (Briefing and Part I Attitude Index)
8:00 a.m.	Saturday	February 27, 1971	Coffee Shop Western Hills Inn, Highway 183	Materials Team Assignments
8:30 a.m.	Saturday	February 27, 1971		Tour
10:30-11:00	Saturday	February 27, 1971	Western Hills	Session II Problem Identifi- cation
12:00	Saturday	February 27, 1971	Western Hills	Lunch
1:00	Saturday	February 27, 1971	Western Hills	Session III Problem Descrip- tion, Goal Setting, Project Selection, Part II Attitude Index.
8:00	Tuesday	March 2, 1971	City Hall	Critique and Presentation of Team Reports