

Land Lines

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Newsletter of the Lincoln Institute of Land Policy



Land Lines

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The Lincoln Institute of Land Policy is a nonprofit educational institution established in 1974 to study and teach land policy and taxation. By supporting multidisciplinary educational, research and publications programs, the Institute brings together diverse viewpoints to expand the body of useful knowledge in two departments—valuation and taxation, and planning and development—and in the program on Latin America. Our goal is to make that knowledge comprehensible and accessible to citizens, policy makers and scholars in the United States, Latin America and throughout the world. The Lincoln Institute is an equal opportunity institution in employment and admissions.

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From the PRESIDENT

In September we published the Institute's course catalog for this academic year, and the listings are also posted on our "new and improved" website, announced on the back cover of this newsletter. I am really proud of the range and depth of the courses we have put together. Our Institute faculty are steadily expanding the curriculum with new individual course offerings and sequences of introductory and advanced courses. I want to highlight a few courses and encourage you to review the website for details on all of our programs.



Jim Brown

Our popular series on conservation easements provides a unique perspective on this important tool for land conservation that has policy consequences for how to value the property and its tax assessment. We have also developed a sequence of courses with the Consensus Building Institute on the use of dispute resolution techniques for professionals involved in land use decision making. The introductory course will be offered three times this year, at Lincoln House and in Colorado and Florida. The advanced course will be offered at Lincoln House in the spring, and a new course is being developed with the Land Trust Alliance specifically to train land trust negotiators.

We will again offer our course for executive directors and staff of community-based development organizations on the reuse of vacant land, brownfields and abandoned property. The phenomenon of brownfields has emerged as one of the most hotly debated topics in environmental and economic development circles. While there are many reasons these properties might be overlooked as too difficult to finance and manage, small-scale community-based developers may have more interest in them than larger developers.

Five times during this year we will host around 25 academics, professionals and policy makers from Latin America in weeklong courses that reflect our commitment to that region. The five topics are value capture, informal land markets and regularization, urban land market policy, land and building taxation, and large-scale urban redevelopment. Bringing the participants together outside their normal environment has been an extremely stimulating experience for faculty and students alike.

We now are sponsoring 15 executive programs that are offered by invitation for senior professionals in particular positions closely related to our interests in property taxation, planning and development. These interactive courses provide the Institute an opportunity to focus on timely issues at both the policy making and management levels. The State Tax Judges program is the oldest of these and will meet this fall for the twenty-second time. Last year we started a new executive program for leaders in the land conservation movement, and we will continue our well-established programs for state planning directors in the northeastern and western states, urban university real estate administrators, and journalists who cover land use and taxation issues. The executive programs are proving to be a very effective way to bring together people who have common experiences and challenges to share with each other and with the faculty, and we see them as a forum for the Institute to have a positive and direct impact on tax and land policy.



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Large Urban Projects: A Challenge for Latin American Cities

As a part of the educational activities of the Lincoln Institute's Latin America Program, a course on "Large Urban Projects," held in Cambridge last June, focused on the most important and challenging aspects of this land planning issue. Academics, public officials and representatives from private enterprises in 17 cities participated in the presentations and discussions. This article presents a synthesis of the principal points, questions and challenges raised in carrying out these complex projects.

MARIO LUNGO

Large urban redevelopment projects have become an important issue in many Latin American countries recently, due in part to changes motivated by the processes of globalization, deregulation and the introduction of new approaches in urban planning. These projects include varied types of interventions, but they are characterized primarily by their large size and scale, which challenge traditional instruments of urban management and financing.

Urban projects on a grand scale are not considered a novelty in Latin America. The diverse elements of existing developments include the revitalization of historic centers; conversion of abandoned industrial facilities, military areas, airports or train stations; large slum rehabilitation projects; and construction of innovative public transportation models. However, at least four features characterize this new type of intervention:

- An urban management structure that implies the association of public, private, national and international actors;
- Significant financing needs that require complex forms of interconnections among these actors;
- The conception and introduction of new urban processes that are intended to transform the city;
- The questioning of traditional urban planning perspectives, since these projects tend to exceed the scope of prevailing norms and policies.

The last feature is reinforced by the influence of different planning strategies and the impacts of large urban projects around the world (Powell 2000). One such project

that has influenced many city planners and officials in Latin America was the transformation of Barcelona in preparation for the Olympic Games in 1992 (Borja 1995). Several projects in Latin America have been inspired by, if not directly emulated, this approach (Carmona and Burgess 2001), but it also has faced serious criticism (Arantes, Vainer and Maricato 2000). It has been seen as a convenient process through

*"Everything can
be predicted except what is
actually going to happen!"*

*"Todo esta previsto excepto
lo que va a pasar."*

which decision makers or private interest stakeholders manage to bypass official planning and policy channels that are seen to be too dependent on the public (democratic) debate. As a result most such projects tend to be either elitist, because they displace low-income neighborhoods with gentrified and segregated upper-class land uses, or are socially exclusionary, because they develop single-class projects, either low-income settlements or high-income enclaves, in peripheral locations.

Large-scale projects raise new questions, make inherent contradictions more transparent, and challenge those responsible for urban land analysis and policy formulation. Of special importance are the new forms of management, regulation, financing and taxation that are required for or result from the execution of these projects, and in general the consequences for the functioning of land markets.

Size, Scale and Timeframe

The first issue that emerges from a discussion of large-scale projects has to do with the ambiguity of the term and the necessity of defining its validity. Size is a quantitative dimension, but scale suggests complex interrelations involving socioeconomic and political impacts. The wide variety of feelings evoked by large projects shows the limitations in being able to restore a vision of the urban whole and at the same time its global character (Ingallina 2001). This issue has just begun to be discussed in Latin America, and it is framed in the transition to a new approach in urban planning, which is related to the possibility and even the necessity of constructing a typology and indicators for its analysis. Issues such as the emblematic character of these projects, their role in stimulating other urban processes, the involvement of many actors, and the significance of the impacts on the life and development of the city are all part of the discussions. Nevertheless, it is the scale, understood as being more than just simple physical dimensions, that is the central core of this theme.

Since the scale of these projects is associated with complex urban processes that combine continuity and changes over the medium and long terms, the timeframe of their execution must be conceived accordingly. Many of the failures in the implementation of such projects have to do with the lack of a managing authority that would be free or protected from the political volatility of local administrations over time.

The cases of Puerto Madero in Buenos Aires and Fenix in Montevideo, the first completed and the second in process, offer examples of the difficulties in managing

the scale and timing of development in the context of economic situations and policies that can change drastically. Twelve years after its construction, Puerto Madero has not yet stimulated other large-scale projects, such as the renovation of nearby Avenida de Mayo, nor appreciable transformations in urban norms.

The scale and timeframe are particularly important for the project in Montevideo, raising doubts about the feasibility of executing a project of this scale in relation to the character of the city, its economy, and other priorities and policies of the country. Its goal was to generate a “work of urban impact,” in this case promotion of public, private and mixed investments in a neighborhood that lost 18.4 percent of its population between 1985 and 1996, and focusing on an emblematic building, the old General Artigas train station. Most of this work has been executed, with a loan of \$28 million from the Inter-American Development Bank, however the percentage of public and private investments are minimal and the Fenix project is having to compete with another large-scale corporate-commercial development located east of the city that is already attracting important firms and enterprises.

Land Policy Issues

The issue of scale relates intrinsically to the role of urban land, which makes one ask if land (including its value, uses, ownership and other factors) should be considered a key variable in the design and management of large-scale urban operations, since the feasibility and success of these projects are often associated with the internalization of formidable externalities often reflected in the cost and management of the land.

Projects to restore historic centers offer important lessons to be considered here. We can compare the cases of Old Havana, where land ownership is completely in the hands of the state, which has permitted certain activities to expand, and Lima, where land ownership is divided among many private owners and public sector agencies, adding to the difficulties in completing an ongoing

restoration project. Even though Old Havana has received important financial cooperation from Europe and Lima has a \$37 million loan from the Inter-American Development Bank, the main challenge is to promote private investment while also maintaining programs of social and economic assistance for the local residents. Both cities have created special units for the management of these projects, which constitutes an interesting commentary on institutional modernization.

The Role of the State

The scale, the time dimension and the role of land in large urban projects lead us to consider the role of the state and public investment. While urban operations on a large scale are not new in Latin American

cities, their present conditions have been affected radically by economic changes, political crises and substantial modifications in the role of the state in general. These conditions make the execution of urban projects, as part of the process of long-term urban development, a source of contradictions with the generally short tenure of municipal governments and the limits of their territorial claims. We must also consider the differences in regulatory competencies between central governments and local municipalities, and the differences between public entities and private institutions or local community organizations, which often reflect conflicting interests due the decentralization and privatization processes being promoted simultaneously in many countries.

Two large projects related to transportation infrastructure are examples of local situations that led to very different results. One was the transformation of the old abandoned Cerrillos airport in Santiago, Chile, and the other was a project for a new airport for Mexico City in Texcoco, an area known as *ejido* land occupied by peasants and their descendants. In the first case, the active participation of interested groups is expanding the recuperation process of a zone of the city that does not have quality urban facilities. A total investment of \$36 million from the public sector and \$975 million from the private sector is supporting the construction of malls, facilities for education, health and recreation, and housing for the neighborhood. In Mexico serious conflicts between state interests and community rights to the land had caused social unrest and even the kidnapping of public officials. As a result, the federal government has recently withdrawn from the Texcoco project, assuming huge political and economic costs for this decision.

Segregation and Exclusion

Many planners and practitioners have doubts about the feasibility of large projects in poor countries and cities because of the distortions that their execution could cause on future

FIGURE 1 A Proposal for Cerrillos Airport



These plans for the redevelopment of a former military airport were prepared by Mario Pérez de Arce and associates of Santiago, Chile, as part of an international competition.

development, in particular the reinforcing tendencies of segregation and social exclusiveness. The diminishing capacity of the state to look for new alternatives for financing socially beneficial projects through private capital, principally from international sources, adds to the doubts about their success. Many large-scale projects are seen as the only alternative or the unavoidable cost that the city or society has to pay to generate an attractive environment in a context of growing competition among cities for a limited number of external investors.

A key matter with respect to the use of public space generated by these projects is to avoid segregation of space and people. Special attention must be given to protect the inhabitants of the zones where the large urban projects are developed from the negative consequences of gentrification. This is without a doubt one of the most difficult aspects of large urban projects. Table 1 shows the most important aspects and the principal challenges of large urban projects. Effectively, the integration of projects of this scope calls for a vision of the city that avoids the creation of islands of modernity isolated in the middle of poor areas, which would contribute to the process called the dualism of the city, or the generation of new exclusive urban centers.

Two cases in different political-economic contexts help us reflect about this matter. One is the El Recreo project, planned by Metrovivienda, in Bogotá. Although presenting innovative proposals about the use and management of the land in a large project for popular housing, the project has not been able to guarantee the integration of social groups with different income levels. In the Corredor Sur area of Panama City large zones are being planned for the construction of residences, but the result again serves primarily medium- and high-income sectors. Thus in both a decentralized and a centralized country the general norms that provoke residential segregation cannot seem to prevent negative consequences for the poorest sectors of society.

In view of all this, large urban projects should not be seen as an alternative approach to obsolete plans or rigid norms like zoning. They could instead be presented as a kind

TABLE 1 Aspects and Challenges of Large Urban Projects

Aspects	Challenges
Urban grid	Integrate the project into the existing city fabric
Planning process	Design the project to be compatible with the established approach to city planning strategies
Urbanistic norms and regulations	Avoid the creation of norms giving privileges of exclusiveness to the project
Stakeholders	Incorporate all participants involved directly, in particular the not so easily identifiable groups indirectly affected by these projects
Financing	Establish innovative public and private partnerships
Social, economic and urban impacts	Develop effective ways to measure and assess various types of impacts and ways to mitigate the negative effects

of intermediate-scale planning, as an integrated approach that addresses the needs of the whole city and avoids physical and social separations and the creation of norms that permit exclusive privileges. Only in this way can large-scale projects take their place as new instruments for urban planning. The positive effects of specific elements such as the quality of architecture and urban design are valuable in these projects if they operate as a benchmark and are distributed with equity throughout the city.

Public Benefits

Large-scale projects are public projects by the nature of their importance and impact, but that does not mean they are the total property of the state. Nevertheless, the complexity of the participant networks involved directly or indirectly, the variety of interests and the innumerable contradictions inherent in large projects require a leading management role by the public sector. The territorial scale of these operations especially depends on the support of the municipal governments, which in Latin America often lack the technical resources to manage such projects. Local support can guarantee a reduction of negative externalities and the involvement of weaker participants, generally local actors, through a more just distribution of the benefits, where the regulation of the use and taxation of the land is a key issue. Such is the intention of the Municipality of Santo Andre in São Paulo

in the design of the extraordinarily complex Tamanduatehy project. It involves the reuse of an enormous tract of land previously occupied by railroad facilities and neighboring industrial plants that fled this once vigorous industrial belt of São Paulo to relocate in the hinterland. The project involves establishing a viable locus of new services and high-tech industries capable of replacing the economic base of that region.

Beyond creating and marketing the image of the project, it is important to achieve social legitimacy through a combination of public and private partners engaged in joint ventures, the sale or renting of urban land, compensation for direct private investment, regulation, or even public recovery (or recapture) of costs and/or of unearned land value increments. Active public management is also necessary, since the development of the city implies common properties and benefits, not only economic interests. Analysis of economic and financial costs, and opportunity costs, are also important to avoid the failure of these projects.

Conclusions

The basic components in the pre-operational stage of executing large urban projects can be summarized as follows:

- Establish a development/management company independent from the state and municipal administration
- Formulate the comprehensive project plan
- Elaborate on the marketing plan

- Design the program of buildings and infrastructure
- Define adequate fiscal and regulatory instruments
- Formulate the financing plan (cash flow)
- Design a monitoring system

An adequate analysis of the trade-offs (economic, political, social, environmental, and others) is indispensable, even if it is clear that the complex problems of the contemporary city cannot be solved with large interventions alone. It is important to reiterate that more importance must be given to the institutionalization and legitimacy of the final plans and agreements than simply the application of legal norms.

The presentations and discussions at the course on “Large Urban Projects” show that the matter of urban land strongly underlies all the aspects and challenges described above. Land in this type of project presents a huge complexity and offers a great opportunity; the challenge is how to navigate between the interests and conflicts when there are many owners and stakeholders of the land. It is necessary to combat the temptation to believe that modern urban planning is the sum of large projects. Nevertheless, these projects can contribute to building a shared image of the city between the inhabitants and the users. This topic clearly has facets that have not been completely explored yet and that need continued collaborative analysis and by academics, policy makers and citizens. **L**

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Testimony from a Course Participant

The job of the private practitioner in the urban development field can be a great creative adventure, but it requires careful thought that takes into account current issues and practices in land policy. Large urban projects are undertaken based on the knowledge and experience of the firm, city regulations and plans, feedback from previous projects, the available budget, the tendencies of the market, the land potentialities and constraints, and even on intuition. Serious consulting firms want to achieve the best project under the particular circumstances, even if they also work for profit. However, the responsibility beyond just designing urban projects is immeasurable, because their implementation affects the city’s sustainability, mobility, public space, and above all the quality of life of its inhabitants.

The challenge is even greater when the firms are working in underdeveloped countries on projects to address the needs of the poor, who often have no other habitat option than the illegal settlements promoted by “pirate developers.” Private practitioners try to compete, but they cannot do so if they want to comply with basic norms and bylaws. The paradox that makes development easier for informal and illegal developers than for private enterprises is constantly challenging the way professionals approach their work in Latin America.

In my own consulting work I have chosen to go beyond conventional projects to fight social exclusion and segregation

and to advance integration in both physical and social terms. This concern gave a new dimension to my work, and I began to alternate research on urban issues with real construction projects. Both the research and the feedback from actual projects contribute important input for the next project. One research study compared the urban and architectural outcomes between planned and unplanned settlements, in particular to seek clues from the unplanned settlements that could be used to make planned projects more competitive. Another surveyed the quality of life that people wanted at the city, neighborhood and household scale, since most planned developments are just acres of houses without public places for social interaction.

As a participant in the Lincoln Institute courses on “Large Urban Projects” and “Informal Land Markets,” I found a forum for discussions with peers from other countries, from Argentina to Mexico. Our problems with urban redevelopment are much the same, but the solutions take different approaches. Through the Institute’s programs we can enrich our knowledge about essential topics such as land markets, value capture, regularization, land use regulations and property taxation, and thus help to improve the life of the vast numbers of people living in substandard conditions. Searching together for tools to produce change is a great and hopeful experience.

Nora Aristizabal
Contexto Urbano, Ltda., Bogotá, Colombia

RELATED PUBLICATION

Land, Rights and Innovation: Improving Tenure Security for the Urban Poor
Edited by Geoffrey Payne

This book examines the complex issues surrounding land tenure and the challenges they present for urban planners in developing and transition economies. Based on extensive research, supported in part by the Lincoln Institute, the editor has assembled a diverse range of cases from 17 countries where the authorities, nongovernmental organizations or communities have evolved practical and innovative approaches to providing tenure for the urban poor. Nora Aristizabal and her colleague Andrés Ortíz Gomez coauthored the chapter titled “Are services more important than titles in Bogotá?” This book is published by ITDG Publishing in London.

2002. 331 pages, paper. £15.95. ISBN 1-85339-544-7
To order this book, contact: www.itdgpublishing.org.uk

Past, Present and Future in Cuba

For the past several years, the Lincoln Institute has been collaborating with the Loeb Fellowship Program based at Harvard University's Graduate School of Design. The program was established in 1970 through the generosity of Harvard alumnus John L. Loeb to allow mid-career professionals to study independently and gain additional tools to help revitalize the built and natural environment. The 2001–2002 Loeb Fellows took their end-of-the-year class trip to Cuba in mid-June, including two days in Santiago de Cuba and four in Havana, with a side trip from Havana to Trinidad and destinations in between.

CLAIR ENLOW

With its neoclassical facades, white cobbles, Caribbean clouds and pastel paint, Trinidad is frozen in time like a watercolor postcard. Because Cuba's architectural heritage is the focus of growing international attention and it's not threatened by waves of new construction, the future of the past seems assured. The future itself is much more difficult to find. As our Loeb Fellowship group searched for clues in three cities and parts of the countryside, we found that despite economic stagnation and international political tension Cubans are hard at work on a future that is uniquely theirs.

An influx of tourist dollars and an aggressive, uniquely Cuban preservation campaign have begun to seize the riches of Old Havana from the jaws of benign neglect. After at least one bad experience with new construction, the Office of the City Historian, which coordinates the impressive large-scale restoration and revitalization of Old Havana, is still grappling with the problem of integrating the new with the historic. One way of addressing the problem is to closely oversee the design of block-sized developments. We walked by one large, modern parking structure inside Old Havana that will be rebuilt as a multi-use building, with parking beside it, according to a design intended to replicate the scale and some of the monumental features of a colonial convent that once stood on the site. Although some residents are being relocated here and elsewhere, many are returning to their homes after their neighborhoods are rehabilitated.

Now considered a model for financing rehabilitation efforts in other districts of



Loeb Fellows watch as a Cuban student (far right) works on an addition to the Havana model (left to right: Marina Stankovic, Jim Grauley, Miguel Coyula, Rick Lowe).

the city, the renewal of Old Havana is based on a system of taxes and joint ventures that includes revenues from the private enterprises profiting from restoration-related tourism. The Office's US\$50 million-per-year budget is divided between construction and social supports for Cubans living within the boundaries of the rehabilitation zone. This can be thought of as a system of "value capture," long a topic of interest at the Lincoln Institute.

Julio César Pérez, a Cuban architect, urban designer and advocate for community-based planning, was a member of our Loeb Fellowship class. With his special perspective as a local practitioner, he showed our group some favorite examples among the rich legacy of pre-revolutionary Deco and Modern architecture in Havana. Five-story gems are set among the very mixed cityscape of central Havana, which also includes the 28-story Edificio Focsa, with its 375 apartment units, built in the twilight of the Batista years.

On the heels of the international style housing blocks and casinos of the 1950s, the revolution brought its own form of land use revision. Julio told a story of Che Guevara and Fidel Castro playing a game of congratulatory post-revolution golf on the vast green of the former Havana Country Club. "How can we make good use of this land?" they mused, according to the legend. The results of their conversation are the grandly metaphoric and mostly unfinished National Schools of Art designed by Ricardo Porro, Vittorio Garratti and Roberto Gottardi. Their stance is deliberately indifferent to the clubhouse or the plan of the golf course, treating the open area as if it were a large meadow in the wilderness. The buildings are slated for restoration, a project made more complicated by poor siting and hydrological problems.

Julio also singled out more recent examples of large-scale construction in Havana, such as the Melia Cohiba Hotel

© Clair Enlow

with its bulky, corporate arch and the Miramar Trade Center, a commercial (dollar) mall across the street. These expensive projects are not only design failures, but also miss the relationship of the site with the sea and the possibility for creating a new quality of place in a developing district.

With the stalled economy and international stalemate of the 1990s, Cuban architect and planner Miguel Coyula and his colleagues have made use of the time and materials at hand to take a more thoughtful approach to land use and development. While vertical cities of steel and glass are popping up on a fast track and enormous scale in cities around the world, one of the world's largest scale city models is being built out of discarded cigar boxes in Havana. This breathtaking miniature landscape was conceived as an aid to planning and an anchor for the efforts of the Group for the Integrated Development of the Capital (GDIC), which has been advising the city government on planning since 1988.

The 1:1000 model of greater Havana has been evolving piece by fitted piece for most of the last decade, and now covers 112 square meters or about a quarter of a basketball court. The model is housed in a specially designed, daylight-filled pavilion in the Miramar area near the center of the city, where drop-in visitors can circulate around and above the model on the broad floor and ramping mezzanine levels. Scale models of virtually every structure in the city are mounted on the wood topographical base. The buildings are color-coded to show development at different stages in history: colonial, pre-revolutionary modern (1900–1958) and post-revolutionary.

Miguel describes one construction project, a high-rise for the Committee for Economic Collaboration (CECE), which was cancelled because the model showed it was clearly out of scale for its location in central Havana. The decision seems to be a milestone because it was a very real project and also symbolic of a determination to build with environmental sensitivity—despite pressures to accommodate foreign investors in cash-strapped Cuba.

The primary mission of the GDIC is intimately familiar to Americans involved

in planning inside major cities: start with neighborhoods. The group has run a series of “neighborhood transformation workshops” for local residents guided by professional designers and planners, selected from the same area when possible. These projects capture the spirit of the international community design movement, a 45-year-old, U.S.-linked tradition in which designers work directly in the interest of area residents. Since both the hard times of the post-Soviet 1990s and the U.S. embargo began taking their huge economic toll on Cuba, these workshops have gained in significance. They have brought plan-



A streetscape in Old Havana

© Clair Enlow

ning and economic development together in a new local context, with neighborhoods tackling projects like urban farming and manufacturing building materials from recycled rubble.

The neighborhood transformation workshops and similar initiatives over the last 20 years have helped to bridge the Cuban revolutionary imperative of equal treatment for all and the very human imperative of making decisions about family, community and daily life. Another example is Architects for the Community, a national civic sector community design practice involved in town construction and environmental planning as well as low-fee design services for individual families. Built on the theories of Argen-

tinean architect Rodolfo Livingston, the practice promotes a direct relationship between the user and the architect while building sustainability and contextual sensitivity into each construction project. Julio worked with the practice for five years before coming to Harvard and he presented a paper with Kathleen Dorgan, another member of the Loeb class, at the Association of Collegiate Schools of Architecture conference in Cuba last spring. As an advocate for more humane and thoughtful land use and building design in his country, Julio is among a number of Cuban architects concerned with traditional values of craft and environmentally appropriate design.

Considering efforts like these, there is hope for a future of construction based on a fine calibration of scale, carefully considered relationships between built fabric and natural features of the surroundings, as well as the comfort and pleasure of the users. The challenge is to find the economic and regulatory means to support appropriate construction. So far, the state has maintained control of land use through direct and almost exclusive ownership, negotiating leases for some private and foreign investment through a delicate and extremely tenuous web of economic and legal formulas for valuing the parcels involved. As the economy becomes tied to the influx of outside currencies, these leases are likely to evolve into more predictable and transparent transactions. Perhaps land sales and heftier taxation are not far behind.

With the coming of foreign investment and the pressures to open up to even more, there will be ample opportunity in the future to be hijacked by land use decisions that are driven by the profit margins of distant organizations, and that would be an unfortunate addition to Cuba's historic burden. Because, despite the beauty of its landscapes and cityscapes, Cuba is a map of victimization—by colonial conquest, crass economic exploitation, revolutionary confrontation, and brutal Soviet-style development.

The Loeb Fellows got an overview of intense nationalism built upon a deep and

diverse culture, cosmopolitan history and the very real achievements of the last 40 years. Cuba is a place of great hardship and also enormous potential, for Cubans and for the rest of the world. We hope that the future does not hold only exploitation and cultural degradation when the barriers to trade and international travel finally fall. We also hope to show that Cuba is a place to learn from the mistakes of the past—theirs and ours—and to find out what is possible when a people are free to protect, respect and enhance their environment. **L**

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Loeb Fellows, 2001–2002

Kathleen Dorgan

Architect and community designer, Storrs, Connecticut

Clair Enlow

Journalist, Seattle

Kathleen Fox

Director, Ohio Arts and Sports Facilities Commission, Columbus.

James Grauley

President, Bank of America's Community Development Corporation, Atlanta

Seitu Jones

Public artist, Minneapolis

Rick Lowe

Public artist and founder, Project Rowe Houses, Houston

Rubén Martínez

Writer, Los Angeles, and professor of non-fiction writing, University of Houston

Julio César Pérez

Architect, urban planner and professor, Faculty of Architecture, Havana

Virginia Prescott

Radio journalist and interactive media specialist, National Public Radio, New York and Boston

Richard St. John

Director, Conversations for the Common Wealth, Pittsburgh

Marina Stankovic

Architect, Berlin

Reviving Environmental Regionalism

CHARLES H. W. FOSTER

Throughout North America, there is a growing trend to approach land use, natural resources and environmental problems on a regional basis. Since existing government agencies often lack broad authority, local and environmental leaders are increasingly taking the initiative to address the social, economic and environmental issues of a particular place by reaching across conventional political and jurisdictional boundaries, sectors and disciplines.

Interest in environmental regionalism has ebbed and flowed over the years, but its roots are as ancient as humankind's first home in Africa's Rift Valley and the early civilizations of Asia, Latin America and the Middle East. Regionalism flourished in Europe during the early nineteenth century and emerged in the U.S. in the form of the western explorations by Lewis and Clark and John Wesley Powell. In the 1930s, regional interest in the U.S. surfaced again in the form of Lewis Mumford's ecological regionalism and the initiatives of the New Deal. After World War II, the U.S. Congress was persuaded to experiment with unifunctional and political forms of regionalism, such as the federal-state river basin and regional commissions. At the turn of the twenty-first

century, prompted by dissatisfaction with the growing numbers, scale and complexity of governmental functions, and coincident with the public commitment to civic forms of environmentalism, the stage was set for the current revival of interest in regionalism.

What Is An Environmental Region?

An environmental region usually has some combination of the following attributes:

- a special place that people care about and identify with;
- a named area that “stirs the blood and arouses passion”;
- a place with a unity or homogeneity of some sort;
- an area defined by common system functions;
- a place with a similar context and culture;
- an area with a psychic identity (a “region of the mind”); and/or
- a place with a history (“story”) around which people can convene, organize and plan for what they want and need (C. Foster 2002a).

Examples of these places abound at different scales throughout the U.S.: Chesapeake Bay, the Northeast's Northern Forest, the Great Plains (popularly termed the Buffalo Commons), the Southwest's Sonoran Desert, the Rocky Mountains, California's Great Valley of the Sacramento River, and

The Everglades represents a well-recognized environmental region threatened by encroaching development.



Courtesy of the South Florida Water Management District

the Pacific Northwest's Puget Sound. The ambitious "Y2Y" (Yellowstone to Yukon) and Northeastern Landscape projects are designed to secure wildland corridors in crucial regions across the borders of the U.S. and Canada.

But environments need not be large to become good candidates for regional action. For example, a cranberry bog lying in two small Massachusetts towns was the spark for an eventual statewide statute permitting jurisdictions of all sizes to enter into joint powers agreements for environmental purposes. In the Deep South, high-level political negotiations currently pre-occupy municipalities, states and federal agencies in the northern portions of the three-state, 20,000-square-mile Apalachicola/Chattahoochee/Flint (ACF) Basin while citizen environmental interests remain focused on the relatively modest, still unspoiled reaches at the southern end of the basin. The famous Quincy Library case in northern California was an initiative prompted by three local citizens, meeting at the town library, to forge a common strategy for nearby national forests. And, on Whidbey Island in Washington's Puget Sound, one of the earliest land management collaborations involved local citizens and jurisdictions serving as surrogates for the National Park Service. In fact, such is the breadth and diversity of regional environmental initiatives across the country that national collaboration expert Julia Wondollock of the University of Michigan has likened them to snowflakes—none exactly alike.

The Harvard Environmental Regionalism Project

Responding to an apparent resurgence of interest in regionalism throughout the U.S. and Canada, researchers at Harvard's John F. Kennedy School of Government in the spring of 1998 asked nearly 150 prominent North American regionalists how regions might be used to advance environmental protection, use and management. The survey paralleled a similar New Deal-era inquiry into the possible use of regions for social and economic development and resulted in an outpouring of

opinions (C. Foster and Meyer 2000). Some respondents advised that regions are bounded and shaped in response to a number of physiographic, hydrologic and biotic factors, while others noted influences built around a strong human sense of place.

Regions tend to be less distinct at the margins than at the core. In fact, many regions exhibit a kind of fractal, multi-core quality, operating through individual components that are layered, nested and organized hierarchically. But all seem to work best when they address real, politically relevant issues occurring in a "problem-shed" context. Thus, regions should be viewed as conceptual frameworks for analysis and practice, and ways to organize processes and relationships in order to harness capabilities and integrate policies and programs within a given area, rather than as definitive lines on a map.

Although environmental attributes will be prominent and compelling in any environmentally based region, they should not be controlling. More important will be the inhabitants' own values, perspectives and priorities, which may include a range of environmentally relevant economic, social, political and cultural objectives. Such regions, like the environment itself, will turn out to be dynamic, not static. The best regions will employ a changing mix of largely organic activities supported by the programmatic services of established governmental agencies and political jurisdictions. Their scales must be large enough to encompass the problem or problems to be addressed, but not so large as to lose any prospect of a supportive constituency. The region's form and administrative structure should be fitted carefully to its proposed programs and functions, and should operate as a viable business organization.

Despite passionate individual adherents for certain kinds of regions (for example, watersheds or ecoregions), no single best type of environmental region seems to fit all circumstances. Each region must reflect its own biological and cultural diversity and represent the needs of both the present and future occupants of the area in question. The survey respondents recommended

starting with a sizable, recognizable, organic landscape, preferably one with a coincidence of natural and cultural features, where sufficient regional consciousness already exists to make the area identifiable (and even nameable). Pluralistic and deliberative processes should then be employed to define the required regional entity. In some instances, preexisting governmental authorities (such as the Endangered Species Act) can serve as the spark; in others, environmental functions may simply be added to established regional agencies for planning, transportation, economic development or metropolitan affairs. Whatever form it may take, and whatever its program objectives may turn out to be, the regional organization must not waver from its goal of achieving meaningful, positive and timely change in the state of the environment by either improving its present condition or removing impediments to its proper management, protection and use.

The Harvard researchers concluded that successful environmental regionalists will need a "tool box" of technical and financial assistance delivered to them through one or more "centers of excellence" established to serve on-the-ground networks of practitioners. Responding to that challenge, the Lincoln Institute has been supporting an inquiry and evaluation of the center of excellence concept through a project known as ENREG (environmental regionalism).

The ENREG Project

The project began with the drafting of a white paper, "Fostering Conservation and Environmental Regionalism: A Blueprint for Action," describing the rationale for and likely attributes of a national environmental regionalism program (C. Foster 2002b). Separate audiences of regional practitioners and organization/agency representatives reviewed and debated the paper during sessions in Salt Lake City in December 2001 and at Lincoln House in Cambridge in April 2002.

After reviewing an extensive inventory and assessment of ongoing regional initiatives (McKinney et al. 2002), the western practitioners agreed that regionalism is by

definition an integrative concept, eventually touching a whole circle of social, economic and political, not just environmental, issues. They noted that regionalism was growing in popularity for several reasons: necessity, self-interest, and as a way to design a shared future and avoid a common fate. They listed a number of obstacles and challenges facing regional initiatives in the West, describing such keys to success as new and creative processes, partnerships, coalitions, planned redundancy, and the exercise of a learning, adaptive attitude on the part of regional practitioners. As strategies to support and promote regionalism,

they encouraged experimentation with different models, use of Internet tools to foster communications and networks, and the development of training programs for regional practitioners built around actual case experience. While they agreed that a common framework for promoting and supporting regionalism would be helpful, they cautioned against any attempt to institutionalize what was in essence an organic movement (McKinney, Harmon and Fitch 2002).

The eastern group used four case presentations to begin sorting out what regions are for, how they might be founded and

used, what role government should be asked to play, and the implications of regionalism in a global sense. In terms of general precepts and strategies, participants were encouraged to be bold, positive, goal-oriented and adaptive. Those seeking to encourage and support regional initiatives should be sure that the right science and data are available at the right time, and that research and documentation do not overlook the crucial role to be played by people in achieving the necessary behavioral/societal changes (Foster 2002a).

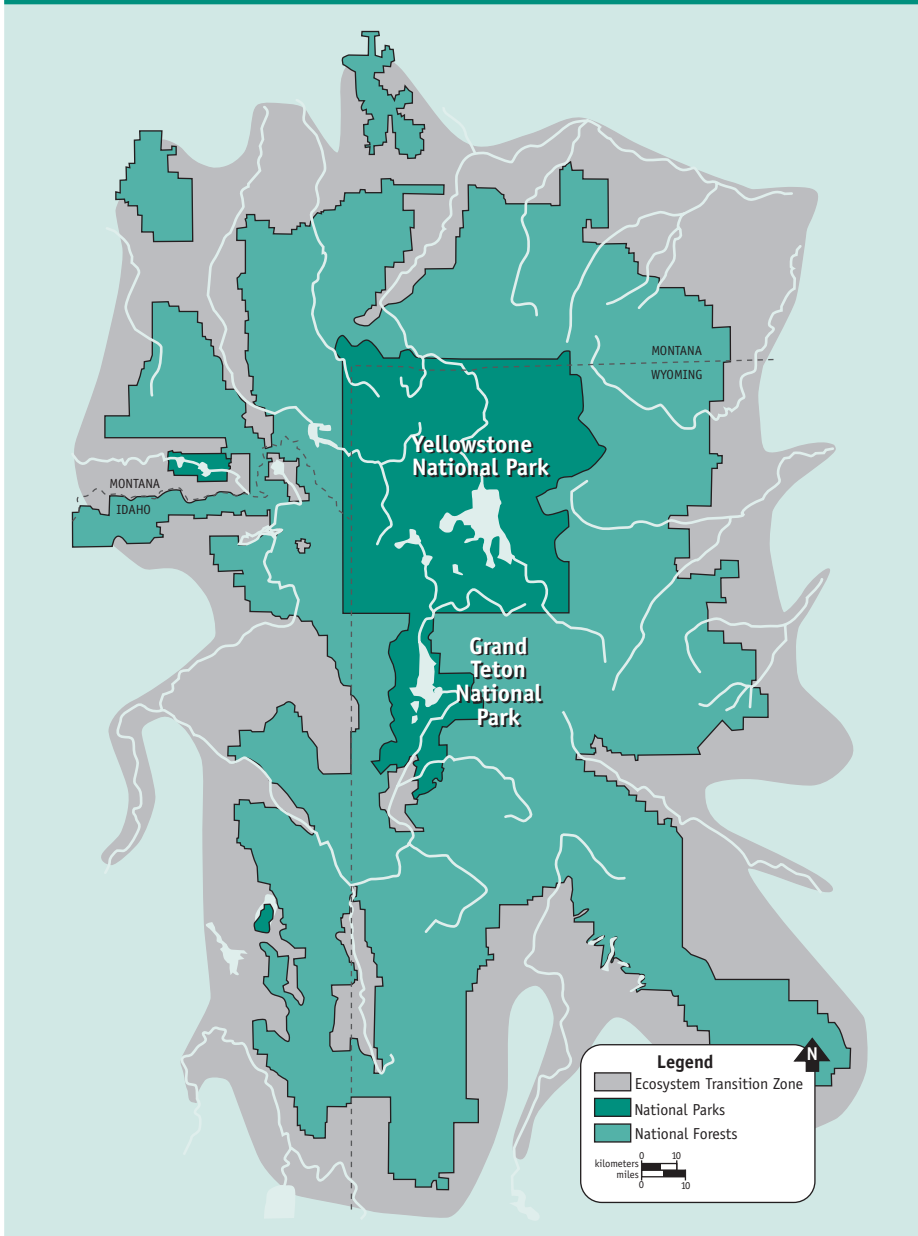
Both groups agreed on the need for specialized education and training in regional environmental practice. The westerners urged training in designing regional initiatives, managing regional organizations and undertaking collaborative problem solving. The easterners suggested a curriculum that would start with concepts, principles and history, and then turn to the skill sets and processes needed to build an effective constituency for change. All favored research and documentation into what works in actual practice, what doesn't, and why.

The Next Steps

Given these encouraging developments, what does the future portend for ENREG and the field of environmental regionalism it is advocating?

First, the Lincoln Institute is developing a short course on practical strategies to help citizens and officials initiate, manage and sustain regional initiatives. It is being designed for people interested in starting and operating regional initiatives or organizations, such as individual activists, local advocacy groups, governmental officials, and business and industry leaders. The course builds on recent work supported by the Lincoln Institute (see K. Foster 2001 and C. Foster 2002) and uses a combination of lectures, case studies and simulations to provide background information and teach practical skills. The first offering of the course is planned in the spring of 2003 for a group of 20 to 30 prospective practitioners and their associated organizations interested in solving environmental

FIGURE 1 Greater Yellowstone Ecosystem



problems according to “the natural territory of the problem,” whether that be watersheds, ecosystems, metropolitan areas, or other types of regions. Ideally, the course will provide an opportunity for people from a common region to come together and begin the process of thinking

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and acting regionally. Future courses may be convened by one or more local organizational cosponsors that will be responsible for the recruitment of practitioners and many of the logistical and organizational arrangements and for working with the Lincoln Institute to provide instructional resources.

Second and closely allied with the short course is an executive seminar for senior regional practitioners who will be invited to share information and learn from one another through a peer exchange process, thereby building and sustaining viable practitioner networks and refining the instructional principles and strategies through the use of experiences drawn from the real world. The first executive seminar will be held in the West in March 2003.

Third, former ENREG national advisor Richard Doege is seeking supplemental funding to establish a national center of excellence on environmental regionalism. His efforts focus initially on case study research and on outreach to Congress, federal and state agencies, and national environmental NGOs. The objective is to develop a constituency for legislation, governmental practices and civic action that can promote sound environmental protection and management through the exercise of regionalism. The case studies are expected to be a critical resource for developing Lincoln’s training curriculum, and the contacts with organizations and agencies will help identify additional venues, targets and cosponsors for future courses. Through his liaison with Congress, Doege has already identified a number of regionalist provisions in important pending legislation. His future outreach efforts will aim to inform Congress and the national environmental community about ENREG’s research findings and help ensure that Lincoln’s curriculum objectives reflect the current status of regionalism in governmental circles.

Finally, the ENREG planners have in mind the ongoing development of curricular materials. For example, the initial elements of theory, skills and practice will be just the first steps toward an entire

“library” of subject matter from which course organizers can make their own selections. Some courses may lend themselves to conversion into distance learning modules so that training can proceed either in conventional course settings or through home computers via the Institute’s web-based instructional program, Lincoln Education Online (LEO). This combination of face-to-face courses and distance learning will advance the Institute’s long-term mission of making knowledge comprehensible and accessible to citizens, policy makers and scholars throughout the world, and ENREG will have more than fulfilled the promise perceived by its proponents at the time of its founding just a year ago. **L**

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Progress Toward Value-Based Taxation of Real Property in Lithuania

KESTUTIS SABALIAUSKAS *and*
ALBINA ALEKSIENĖ

The Republic of Lithuania, which declared its independence from the USSR in 1990, is the largest and the southernmost of the Baltic countries, with a total area of 65,300 sq. km. and a population of 3.5 million. Although the other Baltic countries introduced market value-based land taxes earlier, Lithuania anticipates that its up-to-date real property information system and administration network, managed by the State Land Cadastre and Register (SLCR), will speed its implementation. SLCR has been assigned the task of valuing property for taxation, and will utilize its computerized real property information system of land and building data for this purpose.

Tax systems in Lithuania, established early in the post-Soviet period, are gradually being reformed to accommodate development of democratic institutions and market economies, and to advance negotiations for entry into the European Union. The Lithuanian Governmental Action Program for 2001–2004 identified the introduction of market value-based taxes on land and buildings as a priority, contemplating an expanded tax base and a greater role for local government in fiscal decision-making.

Taxes on Land and Buildings

Currently there are two national taxes: a 1.5 percent land tax paid by landowners and 1.0 percent property tax on the value of property (excluding land) paid by corporations and other legal entities. The tax proceeds are returned to the municipalities, where in 2001 they provided on average just over 8 percent of municipal budgets. The revenue from the property tax was nearly 10 times higher than the revenue

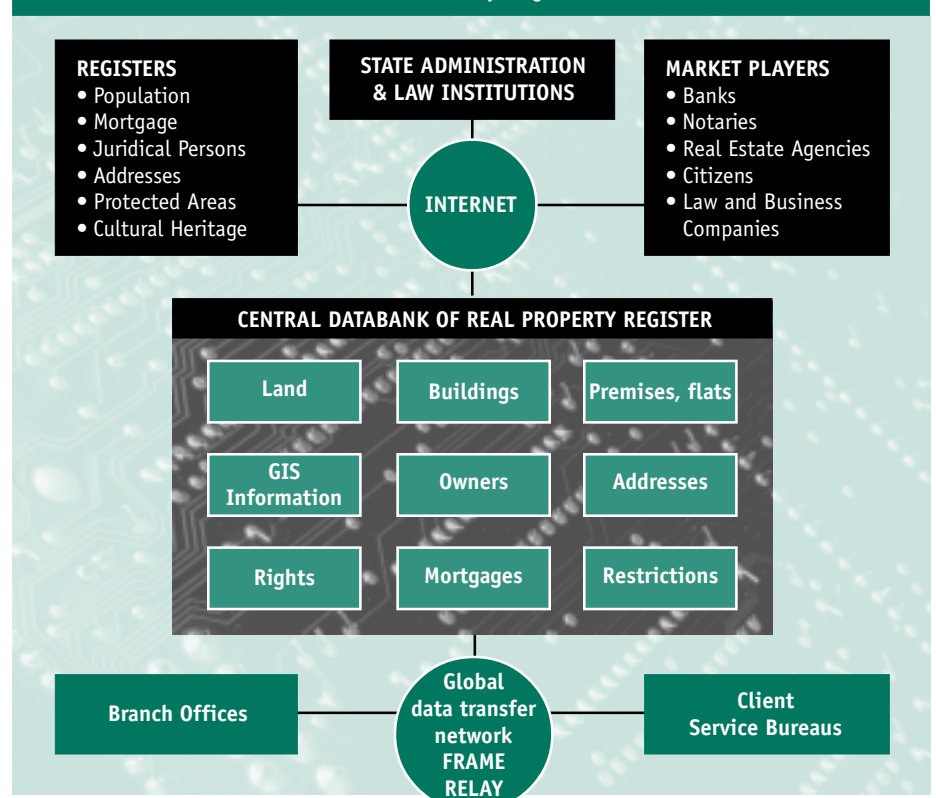


from the land tax, and has increased annually, representing 2.3 percent of national budget revenues. Neither tax has a market value base at present, although some market elements have been introduced gradually in the land tax base.

Development of the Mass Valuation System Information Systems

Lithuania initiated development of computer-based real property data 10 years ago. Since establishment of the SLCR in 1997, a fully computerized Real Property Registration System links land parcels and buildings, and cadastre and register data into one unified system. The computer network covers the entire country and links counties and districts to the central databank, so that computerized registration of real property can take place in any branch office or client service bureau throughout the country. Analysis of the data permits monitoring of changes in the real property market, statistical analysis, and utilization of computer-assisted mass appraisal techniques. Figure 1 illustrates the current operation of the

FIGURE 1 Information Flows on Real Property



Real Property Register and flows of information on real property.

As of August 2002 nearly 4.7 million properties were registered, including more than 1 million land parcels, 615,000 buildings, 1.6 million auxiliary buildings, 950,000 flats and premises, and 395,000 engineering constructions. The central databank is expected eventually to register 6 million properties, including 2.3 million land parcels and 3.7 million buildings of different types.

Sales Data

The SLCR has been collecting real property sales information since 1998, and there are a sufficient number of transactions of flats, garages and land parcels to support mass valuation modeling based on market principles. The SLCR has created a databank of real property sales, and when a new real property unit is formed, it is inventoried and described in the Real Property Cadastre and all property rights are registered in the Real Property Register. At the conclusion of a transaction, a new owner registers the ownership in the register, but the data in the cadastre are not changed. When the transaction is registered the sale price indicated in the purchase-and-sale agreement is recorded into the database, allowing the price information to be supplemented by descriptive (cadastral) attributes. Table 1 shows the number of property sales registered during 1998–2001.

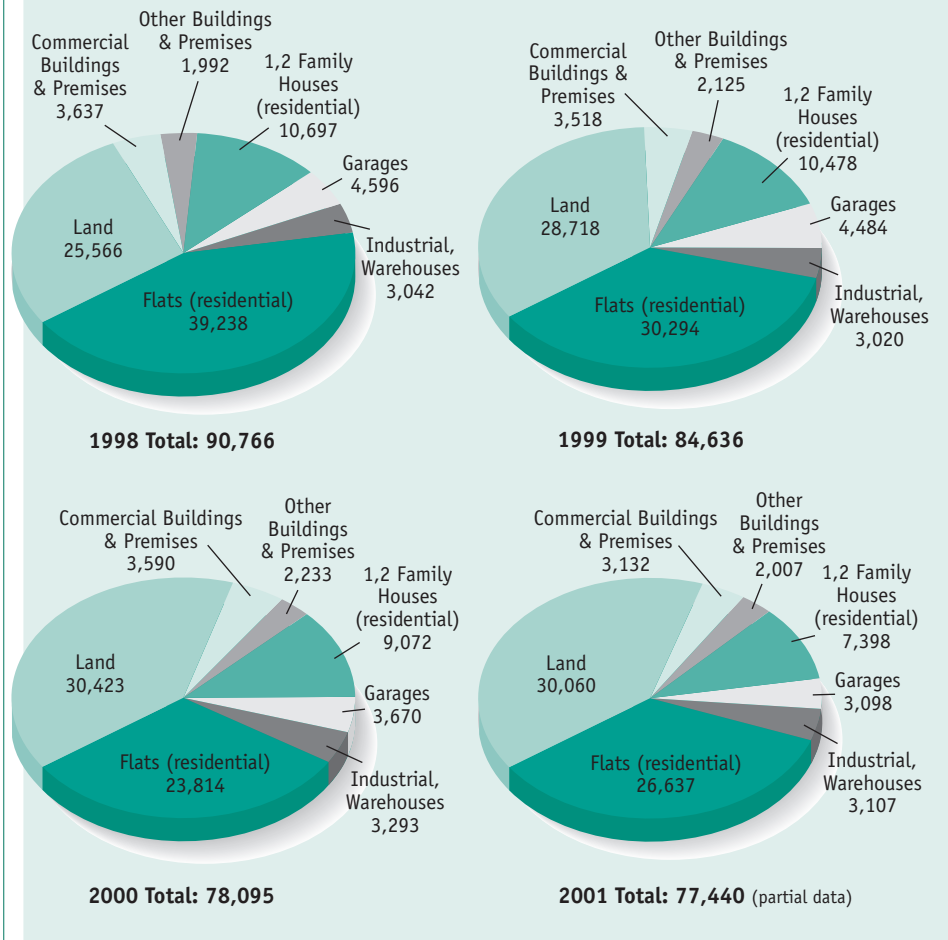
Mass Valuation Pilot Project

To prepare for the implementation of value-based real property taxation, the Ministry of Finance assigned to SLCR the task of undertaking a pilot project using mass valuation techniques. The results will be presented to the Ministry of Finance and other interested state institutions.

SLCR’s objectives are to complete the development of a real property mass valuation system to accomplish the following goals:

- introduce data analysis and mass valuation technologies into practice;

TABLE 1 Sales of Properties by Type, 1998–2001



- prepare property mass valuation methods, corresponding to Lithuanian conditions;
- train specialists to carry out mass valuation; and
- propose improvements to the real property database and adaptations for purposes of mass valuation.

At the conclusion, SLCR will be able to analyze various possibilities for introducing a computer-assisted mass appraisal (CAMA) system in Lithuania, and to prepare proposals regarding ad valorem property tax administration and relevant institutional infrastructure development. The project involves 40 property valuers from both SLCR’s central and branch offices, who have been trained by specialists within SLCR and international experts, including the Lincoln Institute, Organisation for Economic Co-operation (OECD), Swede-

survey and the Finnish National Land Survey.

Progress of Project Implementation

Property valuations have been nearly completed in the 11 municipalities selected as demonstration projects, one located in the territory of each SLCR branch office. The experience gained from these pilot projects will be valuable in extending the valuation throughout the entire country. Table 2 summarizes the progress made by SLCR and the Ministry of Finance in completing various steps in the implementation of the mass appraisal system. □

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A History of SLCR and Lincoln Institute Collaboration

The Lincoln Institute and the Lithuanian State Land Cadastre and Register (SLCR) have been collaborating on a series of seminars and research studies since 1997, in preparation for the introduction of market value-based taxation of real property in this Baltic country. A May 2001 *Land Lines* article, "Market Value-Based Taxation of Real Property," reported on a weeklong course presented in February 2001 at the Lincoln Institute for a group of senior-level public officials from Lithuania. Participants included representatives from Parliament, the Prime Minister's office and the Ministry of Finance; the United Nations Development Program provided financial support for the program. Their visit was important both in developing knowledge of real property taxation systems and in creating a working group of representatives from different governmental institutions who were eager to cooperate in establishing an up-to-date taxation system in Lithuania.

In November 2001, the Institute conducted a follow-up series of programs on market value-based taxation in Vilnius for representatives from institutions includ-

ing the Government of the Republic of Lithuania, several ministries, the Tax Inspectorate, the Association of Municipalities, and the Lithuanian Association of Property Valuers. A second seminar, "Value-Based Taxation Of Real Property in the Baltic Countries: A Comparative Review," drew participants from Estonia, Latvia and Lithuania to discuss the progress of property tax reforms and shared experiences in undertaking mass valuations. A third seminar, organized in cooperation with the Committee of Budget and Finance of the Lithuanian Parliament, attracted many members of Parliament and top-level governmental officials involved in shaping various aspects of tax policy: policy considerations in introducing a real property tax based on market value; the challenges and benefits of value-based taxation; and ways of implementing an efficient real property tax acceptable to the general public in Lithuania. Over 100 representatives of various institutions of Lithuania and the Baltic States attended one or more of these November seminars.

In May 2002 a faculty group organized and sponsored by the Lincoln Institute visited Lithuania for another series of meetings and briefings organized by SLCR to explore effec-

tive approaches to implementing value-based real property tax system. SLCR staff presented extensive information on its activities and readiness to perform mass valuations at central headquarters as well as local offices, where most property valuers work. One outcome of the May meetings is development of an educational program on mass valuation using Lithuania as a case study, which may be valuable to other countries in economic transition. This case will be presented during the next collaborative program to be held in Vilnius in 2003.

Lincoln Institute faculty participating in these programs are Joan Youngman, senior fellow and chairman of the Institute's Department of Valuation and Taxation; Jane Malme, fellow of the Lincoln Institute; Richard Almy and Robert Gloudmans, partners in Almy, Gloudemans, Jacobs & Denne, Phoenix; and John Charman, consultant valuation surveyor, London.

—KS and AA

TABLE 2 Mass Appraisal System

Data Collection and Management System	Data Analysis System	Value Computation System	Procedural and Administrative System
Collection of initial (raw) data	Data classification and grouping	Selection of methods	Budget, planning, scheduling
Data entering	Data Review and selection	Selection of adjustment coefficients	Preparation of written methods, procedures
Sorting of data	Estimation of relative and important parameters of value	Influence of time and location factors (zoning)	Integration of values with registrar data
Data storage and security	Estimation of adjustment coefficients	Formation and calibration of equation	Transmission of data to tax administrator
			Appeals

KEY completed in process in process, working in cooperation with Ministry of Finance incomplete

FACULTY PROFILE

Lavea Brachman

Lavea Brachman is a lawyer and a city planner who has worked and taught in the area of community involvement in brownfields redevelopment projects for the last decade. She is currently director of the Ohio office and associate director of the Chicago-based nonprofit, the Delta Institute, which engages in the policy and practice of improving environmental quality and promoting community and economic development in the Great Lakes region. She is also an adjunct professor at The Ohio State University in the City and Regional Planning Department.

Brachman developed and taught a new course at the Lincoln Institute last spring, called "Reusing Brownfields and Other Underutilized Land: A Seminar for Senior Staff of Community-Based and Non-profit Development Agencies," and she will teach a similar course in 2003. She also wrote an article on "Key Success Factors in Brownfield Property Redevelopment" for a forthcoming Lincoln publication on redevelopment of vacant land.

Land Lines: How did you become concerned about brownfield redevelopment?

Lavea Brachman: Brownfield redevelopment was just emerging as a special focus of urban planning in the late 1980s and early 1990s, when I was working on my master's degree in city planning at Massachusetts Institute of Technology (MIT). As a student, I joined a student-professor team on an early brownfields project for the Massachusetts Water Resources Authority (MWRA) to determine what it could do with some previously utilized property it owned just south of Boston. We assessed three primary aspects (social, legal and physical) to determine the site's redevelopment potential.

That experience and the challenge of dealing with multiple parties and multiple issues that brownfield redevelopment entails peaked my interest intellectually, and I recognized that changing land uses could have profound and positive implications for social change. Previously, as an attorney in Washington, DC, I had practiced in the environmental and land use areas, so the interdisciplinary nature of brownfields redevelopment seemed to bring together my legal and planning training with my professional skills and areas of knowledge and expertise.

LL: What are the primary obstacles to brownfield redevelopment and how have these changed over time?

LB: Contrary to general public misperceptions, the primary obstacle to brownfield redevelopment today is not environmental

contamination per se, even though the prior use and associated environmental conditions of these properties distinguish them from other underutilized properties. The primary obstacle to redevelopment remains the threat of liability that by statute arises from acts that cause or contribute to contamination and/or to those with an ownership interest in the property. A second major obstacle is financing, since brownfields are many times more expensive to redevelop than regular real estate projects. The liability threat also has dampened interest from investors or banks that might be perceived as being in the chain of title.

A third obstacle can be lack of local support. The need for public involvement in brownfield redevelopment, from financing, to regulatory oversight, to local zoning and planning, means that community support is instrumental to making brownfield redevelopment work. The potential fear and lack of understanding about the impact of contamination on a community can also interfere with local support. A fourth obstacle is obtaining site control or clear title, since many brownfield properties are tax delinquent or burdened with liens, and the title may remain in the name of a defunct company.

A final obstacle is location, because many of these properties are found in areas that are littered with multiple vacant properties or they are not readily accessible to all-

important interstate highways or rail networks. Sometimes brownfield sites with a long history of use were at one time accessible to key transportation lines, but those roads or rails have been superseded by new highways located several miles or more away, leaving the abandoned sites isolated from current development activity.

LL: How has the brownfield redevelopment practice evolved over the last decade?

LB: A decade ago, brownfields were not identified as such. They were the legacy of a manufacturing and industrial economy that left behind vacant properties and blighted urban areas and the remnants of laws that, through the nature of the liability schemes, provided disincentives for cleanup. The federal government had not formally recognized the value of redeveloping these properties, and those of us involved in the field early on worked to convince regulators to pay more attention. Also, the fear of another Love Canal (that is, illness among residents arising from property contamination) was still fresh, so there was little flexibility in cleanup standards. Brownfields were redeveloped, if at all, outside the regular, legal constructs or under special agreements between owner and regulator, or by using special contracts that prevented a future buyer from being held liable for previous contamination.



FACULTY PROFILE

Now brownfield redevelopment has been increasingly streamlined and is seen by developers as a real estate deal with a twist—the environmental cleanup. Many of the primary obstacles mentioned above remain, although they have been somewhat diminished over time, as new state and federal policies, laws and regulations have been passed specifically to address brownfields liability, provide new funding sources, alter title processes for expunging tax delinquent and other liens, and even require community involvement. Last December, for example, Congress passed the “Brownfields Revitalization and Environmental Restoration Act of 2001,” which provides for additional grants and loans for certain activities and clarifies liability.

Brownfields offer an interesting case study of how informal processes that originally emerged out of necessity outside the legal, policy and financing mainstream have been increasingly institutionalized. For instance, where once a property would remain unremediated and fenced off because the cleanup was too burdensome and expensive, or the cleanup would be the subject of years of litigation, now a property that is marketable can act as an incentive for all parties to proceed rapidly.

In the strong market of the 1990s, the real estate pressures allowed even some hard-to-develop properties to be redeveloped, although it was primarily the “low hanging fruit” or the brownfields that were already either well-located, had minimal contamination, or were not complicated by multiple parties contributing to past contamination. The liability on these properties could be capped and financial institutions thus could reduce their risk. Also the regulatory climate has become less aggressive with the passage of “voluntary cleanup statutes,” which allow cleanups to be accomplished without regulatory oversight in many states. The ultimate carrot is a government agreement not to hold future owners liable (that is, a covenant not to sue) if they meet certain standards. To date, fewer cleanups than predicted have actu-

ally been accomplished under these new state laws, but they create a climate ultimately more conducive to redevelopment. Nevertheless, in the weaker economic market of 2002 there will be less brownfield redevelopment, particularly of sites without easily marketable attributes.

***LL:** Who are some of the key players in successful redevelopment projects?*

LB: Like most real estate deals, brownfield redevelopment inherently involves multiple parties. Public-private partnerships are particularly crucial to the success of brownfield redevelopment projects, because of the quasi-regulated nature of the cleanup and the complicated financing arrangements. The list of potential key players is a long one. It includes state and or federal regulators, elected community officials and other community leaders, private developers (both for-profit and not-for-profit), past and future property owners, private financial institutions or investors and public funding sources. Often those essential parties are traditional adversaries. For instance, designating the future use of a brownfield property must involve a state (and sometimes federal) regulatory agency, which can approve the cleanup standard for the particular use (normally higher for residential and lower for industrial) and plan to remove the contamination, as well as former and/or future owners who under previous legal standards would have been held liable by the regulatory agency.

Funding for the cleanup and redevelopment comes from a variety of sources. Notably, up to 70 to 80 percent of funding for brownfield projects can be from public funding sources, but usually those public monies are predicated on private (often local) institutional financing as well, making the public-private nexus very important.

***LL:** What is the role of community-based organizations in brownfield projects?*

LB: Community support and leadership from the local government are essential to the successful redevelopment of a brownfield

property. For instance, localities often must be the applicant for the essential public (state or federal) funds needed to accomplish the project. If zoning or subdivision changes must be made through local boards, local support and leadership is crucial. Community-based organizations such as community development corporations should play an active role in brownfield redevelopment as well, particularly in areas that are not as naturally attractive to private market actors. In these areas, broader community planning efforts undertaken by community groups, such as community-wide master plans, are often productive starting points if multiple brownfield *and* other underutilized properties need to be addressed.

Nevertheless, to many community groups these sites remain intimidating for several reasons: the technical aspects of the contamination; the stigma attached to the properties by their condition; and their location in generally blighted and hard-to-market areas. Furthermore, brownfield sites present more upfront barriers not present in the kinds of housing development projects traditionally undertaken by community-based organizations, such as site remediation, title issues, the assembly of multiple parcels, and the complex financing that is necessary from multiple sources. Getting community organizations past these threshold issues through capacity building and training in technical skills will position them to address more strategic brownfield redevelopment challenges.

Given recent state and federal statutory changes and multiple sources of public funding, the redevelopment of single brownfield properties in stable or improving markets now involves fewer legal and financial barriers. It also requires a very different strategy from developing properties in declining markets where there are other non-brownfield barriers to be overcome. The challenge for addressing brownfield properties in these latter areas remains to be solved, but community involvement is certainly a key aspect to its resolution. **L**

Dissertation Fellowships for 2002–2003

The Lincoln Institute's Dissertation Fellowship program supports Ph.D. students whose research focuses on some aspects of land and tax policy. The program provides an important link between the Institute's educational mission and its research objectives by supporting scholars early in their careers. During the 2002–2003 academic year, 11 students are receiving fellowships to pursue their thesis research.

Urban Area Governance and Interjurisdictional Competition

Stephen R. Aylward

Department of Government and Politics



University of Maryland, College Park

Basic prisoner's dilemma game theory has been employed to support a common hypothesis in urban political economy: Urban areas

fragmented into many jurisdictions (versus a single metropolitan government) tend to have higher levels of interjurisdictional competition for business location. However, OLS regression applied to national survey data produces a counter-intuitive result: Greater fragmentation is associated with cooperation, not competition. Either the number of participants is not the critical factor in collective action success, or a different game such as the assurance game is applicable. This study evaluates several mechanisms for such cooperation in urban areas, including regional political regimes.

* denotes fellowships in the Latin American Program

Land Market and Spatial Structure in Intermediate Mexican Cities: Aguascalientes and Querétaro (1970–2000)

* **Eftychia Bournazou**

Department of Architecture

National Autonomous University of Mexico, México, D.F.



This project will follow up on a prior study of spatial transformation patterns under accelerated growth, to examine the manner in which the market imposes the guidelines of territorial

growth and characterizes the efficient or inefficient way the spatial structure changes. These ideas will be developed in a comparative case study of typical Mexican intermediate cities, focusing on the regulating role of the state on the land market.

Tax Increment Financing Districts: Determinants of Property Value Growth & Testing for Strategic Interaction

Paul F. Byrne

Department of Economics

University of Illinois at Urbana-Champaign



Although the majority of empirical research on Tax Increment Financing (TIF) districts has examined effects of the TIF at the municipal level, this project will study the

performance of TIF districts at the actual district level. The project will focus on three questions: First, what does the typical TIF district look like? Second, which district characteristics are important in influencing the success of TIF? And finally, do municipalities engaged in strategic interaction in their TIF adoption decision?

Transit Capitalization: The Interactive Effect of Transit Accessibility and Zoning Regulation on the San Diego Real Estate Markets

Mike Duncan

Department of City and Regional Planning

University of California, Berkeley



This project will analyze the capitalization effect of transit accessibility/proximity on land markets in the San Diego Metropolitan Area. San Diego has embraced transit-oriented devel-

opment (TOD) more than most cities, and has zoned its transit corridors accordingly. This study will focus specifically on how zoning policy interacts with transit to influence land values, and will create a model with a rich set of control variables. The findings can be used to shape future zoning policy and TOD policy so as to maximize the returns (public and private) on transit investment.

Revitalization of a Colonial City Center: Heritage Development and Urban Transformation in Old Havana

* **Matthew J. Hill**

Department of Anthropology

University of Chicago, Illinois



Using Old Havana, a UNESCO World Heritage Site, as a case study, this research will examine the use of regulatory reform and cultural tourism as vehicles for urban redevelop-

ment in a late socialist city. Specifically, the research will seek to answer three interrelated questions: First, how has the recently enacted regulatory environment in Old Havana shaped decisions about land use? Second, how has the new restoration authority balanced the needs of economic and social development? And third, what is the impact of heritage restoration and tourism on the use of public space?

After the Crisis of Modernity: Land Use Planning and Patterns in Post-Industrial Cleveland, Ohio, and Post-Socialist Sofia, Bulgaria

Sonia Angelova Hirt

*Taubman College of Architecture and Urban Planning
University of Michigan, Ann Arbor*



This research examines the extent to which land use planning has undergone a paradigm shift: from a model which found legitimacy in technical expertise, strove to impose rational order on urban space and promotes public participation, and encourages compact urban form and land use mixture. The research is based in two metropolises—one in North America and one in Eastern Europe—that have both experienced a crisis of modernity. It aims to illuminate the contradictory nature of the paradigm shift and derive land use policy implications for both sides of the Atlantic.

The Effects of Tenure Regularization in Informal Settlements of Metropolitan Lima, Peru

*** Ayako Kagawa**

*Department of Geography
University College London, England*



Debates on the relationship between property ownership and economic development have been ongoing for several decades; however, they still rely heavily on conceptual discussions and not sufficient empirical works. This research seeks to add an empirical case to contribute to the debate through development and implementation of a longitudinal survey to investigate the effects of tenure regularization policy in Peru, and collection of qualitative data amongst the stakeholders on their behavior and perceptions towards land title and tenure security.

Land Policy and the Land Market in Zambia

Maliti Musole

*Department of Land Economy
University of Aberdeen, Scotland*



Zambia has had two land policy reforms since independence in 1964. The first reforms, in 1975, introduced far-reaching changes in land law and property ownership in favor of state-ownership. Consistent with the new government's economic liberalization policy, the second reforms, in 1995, attempted to reverse much of what had been introduced in the 1975 reforms. Arguably, these policy changes affected land market operations and land development process significantly. This study attempts to analyze whether the reforms did actually affect land market operations, and the nature and extent of the impact of the said reforms, so that decision making can be well informed.

Land Sharing as Power Sharing: Evaluating 20 years of Experience with Land Sharing in Bangkok

Paul E. Rabé

*School of Policy, Planning and Development
University of Southern California, Los Angeles*



This research evaluates the impact of land sharing as a solution to the slum eradication problems in Bangkok from 1982–2002. The main premise is that land sharing is as an exercise in power sharing between landowners and occupants (squatters and tenants). For land sharing to be a relevant alternative to relocation, power relations between landowner and occupants must be evenly matched. The research investigates the importance of four “power variables” in shaping six land sharing schemes in Bangkok: the state of the land and property market, community cohesion, the presence of a third party intermediary, and public policy interventions.

The Role of Fiscal Considerations in Local Land Use Planning

John V. Thomas

*Department of City and Regional Planning
University of California, Berkeley*



The fiscal distortion of land use is often highlighted as a major policy issue; however, much remains unknown about how fiscal incentives and constraints shape land use policies. This research evaluates the factors supporting fiscally motivated strategies. Surveys of state and local officials catalog basic planning and finance policies. These survey responses are combined with city-level data to test explanatory models of municipal permitting. The results are used to evaluate implications of strong versus weak incentives for metropolitan regions.

Land Valuation and the Creation of a Fiscal Cadastre: A Case Study of the General Valuation Project and Property Rating System Applied in the City of Cape Town

Jennifer Whittal

*School of Architecture,
Planning and Geomatics
University of Cape Town, South Africa*



The city of Cape Town is in the process of undertaking a general valuation in which computer-assisted mass appraisal (CAMA) is used in order to generate a common valuation roll from which property rates can be generated. The application of CAMA has not been used before for large-scale valuation of properties in Africa, and probably not within the developing world. This research will create a case study that monitors and analyzes the modeling and review processes, as well as the structures and processes employed by the city.

PROGRAM CALENDAR

Courses and Conferences

The courses and conferences listed here are offered on an open admission basis and are presented at Lincoln House in Cambridge, Massachusetts, unless otherwise noted. For more information about the agenda, faculty, accommodations, tuition fee and registration procedures, visit the Lincoln Institute website at www.lincolninst.edu or email to rboff@lincolninst.edu.

TUESDAY, OCTOBER 22

Land Market Monitoring

University of Maryland
Gerrit Knaap, Department of Urban Studies and Planning, University of Maryland, College Park

This course identifies the elements of a locally based land monitoring system and illustrates its applications. Topics to be covered include components of a land monitoring system, data requirements, and its uses and limitations. In addition, the concept of land supply as an inventory problem is introduced, as well as the relationships between land supply monitoring, urban growth processes and growth management policy. The course is relevant to professionals working in planning, transportation, infrastructure, housing and other locally delivered services.

THURSDAY–FRIDAY, OCTOBER 24–25

Land Use in America

Armando Carbonell, Lincoln Institute of Land Policy; and Harvey M. Jacobs, Department of Urban and Regional Planning, University of Wisconsin-Madison

This course explores the historical and cultural heritage that forms the foundation for understanding the difficulties inherent in land use and environmental planning. It then reviews a set of policy approaches used by local governments for managing privately owned lands, and assesses why so few creative planning and implementation tools are actually adopted. Incorporating policy, legal and developer perspectives on local land use, the program combines an interactive lecture format with a problem-solving case study approach.

THURSDAY–FRIDAY, OCTOBER 24–25

Miami, Florida

THURSDAY–FRIDAY, NOVEMBER 7–8

Denver, Colorado

Mediating Land Use Disputes (Series I)

Armando Carbonell, Lincoln Institute of Land Policy; and Lawrence Susskind, Consensus Building Institute, Cambridge, Massachusetts

Land use disputes tend to be among the most contentious issues facing communities throughout the U.S. as local officials struggle to find ways of balancing environmental protection, economic development and private property rights. This two-day introductory course for planners, policy makers, public officials, developers and community advocates presents practical experience and insights into negotiating and mediating solutions to conflicts over land use and community development. Through lectures, interactive exercises, gaming and simulations, participants discuss and work with cases involving land development and community growth, designing and adopting land use plans and evaluating development proposals.

TUESDAY, OCTOBER 29

The New Model of Tax Administration: Computer-Assisted Mass Appraisal, Geographic Information Systems, and Spatial Analysis (Valuation Series II)

Jerome C. German, Lucas County Auditors Office, Toledo, Ohio; and Michelle Thompson, Lincoln Institute of Land Policy

Large-scale valuation of land throughout a taxing jurisdiction requires techniques different from the intensive single-parcel approach considered in the course on “The Theory and Practice of Land Valuation.” This advanced course reviews innovative methods for integrating computerized appraisal and spatial analysis techniques and considers their place in modern assessment practice.

FRIDAY, NOVEMBER 1

Redesigning the Edgeless City

Armando Carbonell, Lincoln Institute of Land Policy; and Robert Yaro and Robert Lane, Regional Plan Association, New York City

Presented in collaboration with the Regional Plan Association and based on the handbook, *Redesigning the Edgeless City*, this course introduces planning and policy advocates, city and state officials, developers and citizen stakeholders to the principles and techniques outlined in the handbook that can be applied in different metropolitan contexts. Previous courses on this topic have dealt with such cases as the design of a sustainable suburban highway corridor and ways to redesign mature suburban areas into pedestrian-friendly, transit-oriented centers with a strong sense of place.

WEDNESDAY, NOVEMBER 6

Valuing Land Affected by

Conservation Easements (Series I)

Joan Youngman, Lincoln Institute of Land Policy; and Charles Fausold, Cornell Cooperative Extension of Schuyler County, New York

By restricting the future development of privately owned land, conservation easements offer a means of preserving land that has unique natural features or is environmentally sensitive. This conveyance has important consequences for the value of the property and for its tax assessment. However, the correct valuation of such property is often subject to dispute. That uncertainty impedes donations of conservation easements, fosters unnecessary tax litigation, and requires individual assessors to confront unresolved basic issues of land and tax policy. This introductory course presents practical information, legal principles, appraisal theory and examples, and treatment of conservation easements for state and federal tax purposes.

FRIDAY, NOVEMBER 15

Web-Based Planning

Armando Carbonell, Lincoln Institute of Land Policy; Gerrit Knaap, Department of Urban Studies and Planning, University of Maryland, College Park; and Lewis D. Hopkins, Department of Urban and Regional Planning, University of Illinois, Urbana-Champaign

Information technology is dramatically changing how local governments plan and manage growth. Today, plans in some places

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are built with geographic information systems that are continuously monitored and updated, and accessible via the World Wide Web. This course, intended to advance the state-of-the-art of web-based planning technology, examines existing uses of information technology in planning and, through hands-on workshops, develop a template for web-based systems for making and managing plans for urban development.

SUNDAY-FRIDAY, NOVEMBER 17–22

Informal Land Markets: Regularization of Land Tenure and Urban Upgrading Programs

Martim Smolka, Lincoln Institute of Land Policy; and Edésio Fernandes, International Research Group on Law and Urban Space (IRGLUS), London, England

Participants from diverse professional backgrounds examine informality and the land tenure regularization process from different perspectives, through the analysis of Latin American and other international cases presented by the participants. Areas of analysis include understanding the formal-informal urban land market nexus; legal issues associated with the security of tenure; property rights and housing rights; alternative policy instruments; new institutional settings; and managerial procedures leading to alternative modes of project implementation, including community participation; and assessing and evaluation of programs at the project and city levels.

TUESDAY, DECEMBER 3

Visualization and Visioning

Michael Kwartler, Environmental Simulation Center, New York City; and Gianni Longo, ACP-Visioning and Planning, New York City

Visioning has become an accepted technique to build broad-based agreement on goals and strategies for the future of a neighborhood, a city or a region. When used in conjunction with visualization techniques, it is a powerful tool that allows stakeholders and citizens to make informed decisions on the physical quality of future development. This course defines principles for effective

visioning, reviews case studies and includes a hands-on workshop to allow participants to experience visioning and visualization techniques in a realistic situation.

WINTER, TBA

Training for Land Trust Negotiators (Mediating Land Use Dispute Series III)

Armando Carbonell, Lincoln Institute of Land Policy; and Lawrence Susskind, Consensus Building Institute, Cambridge, Massachusetts

Good negotiation skills are essential to the preservation open space, habitat, and farm and ranch land across the U.S. Those interested in land trust negotiation need to think analytically and strategically about their goals and methods and the particular context of negotiations for land easements, purchase and care. Too often feeling that they are on the “asking” end of the negotiation, and not the “offering” end, land trust negotiators fail to both create and claim value that can benefit communities, ecosystems, and future generations. This intensive one-day negotiation skills course, offered in conjunction with the Land Trust Alliance, includes lectures to introduce the concepts of mutual gains negotiation, hands-on opportunities in two negotiation exercises and group discussion about the particular challenges of land trust negotiations.

THURSDAY, JANUARY 23

Washington, DC

Two-Rate Taxation of Land and Buildings

John Wallis, Department of Economics, University of Maryland; and David Brunori, Tax Analysts/State Tax Notes, Washington, DC

This one-day program presents a variety of political and economic views on the taxation of land and buildings, and the rationale for applying different tax rates to land and buildings. Speakers address the economic impact of two-rate taxation, its history in Pennsylvania, and current issues in the assessment of land value. Cosponsored with Tax Analysts/State Tax Notes

THURSDAY, JANUARY 30

Visualizing Density

Julie Campoli, Terra Firma Urban Design, Burlington, Vermont; and Alex MacLean, Landslides Aerial Photography, Cambridge, Massachusetts

As smart growth initiatives gain momentum across the country, one of the persistent obstacles to compact development is the public’s aversion to density. Misplaced concerns over density often prevent the construction of urban infill projects or the revision of zoning regulations that would allow for compact growth. Part of this aversion is based on an inability to imagine high-quality, high-density living environments. This workshop offers planners, designers and community development officials specific tools for measuring density, as well as graphic techniques for illustrating it. Using aerial photography and computer graphics, it focuses on the link between urban design and density, exploring how various design approaches accommodate residents.

THURSDAY, FEBRUARY 13

Conservation Easements Policy Seminar (Series II)

Joan Youngman, Lincoln Institute of Land Policy; and Charles Fausold, Cornell Cooperative Extension of Schuyler County, New York

This seminar assumes some familiarity with the basic concepts of conservation easements. It presents alternative views on policy questions raised by current practice. Instructors with expertise in local government finance, environmental protection, property law and federal taxation consider the appropriate role for state oversight in the easement process, the distribution of the benefits and costs of easement protection, the effect of estate tax reform, and the desirability of perpetual restrictions on development.

MONDAY-FRIDAY, FEBRUARY 17–21

Urban Land Markets: Policy and Development

Martim Smolka, Lincoln Institute

This comprehensive course, designed for faculty who teach land policy-related courses in Latin American universities,

PROGRAM CALENDAR

reviews core issues of urban land policy, including functioning of urban land markets (both formal and informal), land use regulation, property taxation, value capture and specific issues such as urban sprawl, spatial segregation, speculation and vacant land. The course synthesizes course modules and teaching materials on land policy for various audiences, including university students, practitioners, policy makers and community leaders. Through the exchange of ideas and experiences on teaching method, it provides participants with new tools and methodologies for designing a more interdisciplinary approach to land policy issues, including web-based instruction and use of the case study method.

Lincoln Lecture Series

The lecture series is presented at Lincoln House in Cambridge, Massachusetts, at 12 noon, and a complimentary lunch is provided. To pre-register, contact help@lincolninst.edu.

THURSDAY, OCTOBER 31

Public Attitudes Toward Taxation and Tax Evasion

Steven M. Sheffrin

Division of Social Science, College of Letters and Science, University of California, Davis

THURSDAY, NOVEMBER 14

Web-based Planning: Using and Managing Plans

Gerrit Knaap

Department of Urban Studies and Planning, University of Maryland

Audio Conference Training Program for Planning Officials

This series is cosponsored with the American Planning Association (APA). All programs are one hour and begin at 4 p.m., E.T. For registration information visit www.planning.org or call APA at 312.431.9100.

WEDNESDAY, NOVEMBER 6

Getting to Density

A principal tenet of smart growth is to plan for and encourage more compact development. But what does greater density really mean for residential and commercial use? What approaches to regulation and design can be invoked to make higher densities work and be accepted? Panelists discuss various approaches and lessons learned, and provide guidance to communities on when, where and how to consider density.

WEDNESDAY, DECEMBER 4

Mastering Meeting Management

Veterans of public meetings share their techniques and insights in how to run productive, effective meetings. Learn

how to make legally defensible decisions, evaluate evidence and keep public anger from disrupting your meetings. Panelists also explore how to encourage more diverse participation.

WEDNESDAY, FEBRUARY 5

Update on Planning and Environmental Law

The legal landscape of planning and environmental law is constantly shifting. Four of the nation's leading planning and environmental law attorneys discuss what to watch for in 2003 and how to write defensible decisions in light of recent legislation and case law.

CD of Land Market Conference Papers

In July 2002 the Lincoln Institute sponsored an international conference titled, "Analysis of Urban Land Markets and the Impact of Land Market Regulation." The conference organizers were Rosalind Greenstein, Lincoln Institute; Paul Cheshire, Department of Geography, London School of Economics, England; and Stephen Sheppard, Department of Economics, Williams College, Massachusetts. The authors and discussants of conference papers were: Roger Bolton, Jean Cavailles, John Clapp, Ed Coulson, Alan Evans, Richard Feiock, Steve Gibbons, Joe Gyourko, Anna Hardman, Keith Ihlanfeldt, Yannis Ioannides, Elena Irwin, Annette Kim, John Landis, Francois Ortalo-Magne, Steve Machin, Steve Malpezzi, Geoff Meen, Ed Mills, Henry Overman, Dominique Peeters, Chris Riley, Stephen Ross, Don Shoup, Yan Song, and Jacques-Francois Thisse, Susan Wachter and Junjie Wu.

The conference was designed to stimulate new analytical work on both the role of urban land markets and the impact of land market regulation systems. The conference brought together economists and urban planners with a view to encouraging new, policy-relevant analysis on land markets and their regulation, and more fruitful communication across different disciplines. The motivation behind the conference was the idea that land markets are about much more than land. In fact, land and real estate markets play an important role in delivering life opportunities and experiences, and their regulation has both direct and indirect economic effects that extend into many areas of economic life and public policy.

The Lincoln Institute has compiled the conference papers and discussant comments on a CD, and the individual papers may be downloaded for free on the Institute's website (www.lincolninst.edu). To order the CD, contact help@lincolninst.edu, use the order form in this newsletter, or order on the website.

Analysis of Urban Land Markets and the Impact of Land Market Regulation Paul Cheshire and Stephen Sheppard, editors

2002. \$7.00 plus shipping and handling. CD002



2002-2003 Course Catalog

The Lincoln Institute's annual course catalog incorporates department descriptions and listings of courses, conferences, fellowships and other education programs. This illustrated publication offers a comprehensive overview of the Institute's mission, its activities and faculty for the current academic year.

To request a copy of the catalog, please email your complete mailing address to help@lincolninst.edu or call 1-800-LAND-USE (1-800-526-3873). Updates and additions to the course offerings are posted on our website (www.lincolninst.edu) for easy reference.

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What's New on the Web?

The Lincoln Institute has launched an entirely new website that provides a simplified interface and new features that make it easier for users to quickly obtain information on land and tax policy.

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