

Land Lines

Newsletter of the Lincoln Institute of Land Policy

Urban Development Options for California's Central Valley

William Fulton

For more than a century, California's Great Central Valley has been recognized as one of the world's foremost agricultural regions. A giant basin 450 miles long and averaging 50 miles wide, the Valley encompasses some 19,000 square miles. With only one-half of one percent of the nation's farmland, the Valley accounts for 8 percent of the nation's farm output—including 15 percent of America's vegetable production and 38 percent of fruit production.

Today, large parts of the Valley are making a transition to an urban economy. Led by such emerging metropolitan areas as Sacramento, Fresno and Bakersfield, the Central Valley already has more than 5 million residents. State demographers predict growth to reach almost 9 million people by 2020 and more than 11 million by 2040.



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Housing, highways, levees, rivers, and agricultural lands intersect across the Central Valley, as shown here along the Sacramento River.

Given this scale of urban growth, what are the key issues facing the Valley? With the assistance of the Lincoln Institute, the Great Valley Center—a non-governmental organization supporting the economic, social and environmental well-being of California's Central Valley—has undertaken an effort to try to frame this basic question. Which issues are purely local, and which ones require a more regional approach? What are the constraints the Valley faces in the decades ahead? And, finally, what are the choices? How might the Valley approach the question of accommodating urban growth while still retaining an agricultural base, a vibrant economy, a good quality of life and an enhanced natural environment?

Perhaps the biggest question is simply whether the Central Valley can accommodate such a vast quantity of urban growth and still maintain its distinctive identity.

For decades, the Valley's regional environment consisted mostly of three elements intertwined on the landscape—vestiges of nature, a panoply of crops and compact agricultural towns. The development of agriculture created a rural landscape, but one in which nature was often sacrificed for agricultural production. A distinctive urban form evolved that was far different from the rest of California. The Valley's older towns, often sited on railway lines, are typically compact but not dense, with wide, shady streets stretching out along the flat expanse from an old commercial downtown.

Regional and Sub-Regional Growth Dynamics

In determining urban development options for the Central Valley, it is important to understand the context of growth dynamics

See [Central Valley](#) page 2



September 1999
Volume 11, Number 5

- 3 APA Training Series
- 4 Property Tax Administration in Porto Alegre, Brazil
- 6 Tax Reform in Mexicali
- 8 Loeb Fellows in Mexico
- 9 Dissertation Fellowships
- 12 Curriculum Development and Research Projects
- 15 Recent Working Papers
- 16 Calendar/On the Web

Central Valley

continued from page 1

that affect the entire region as well as important sub-regions. Although the geographical size of the Central Valley is very large—far larger than many states, for example—in many ways it should be viewed as one region with a common set of characteristics and problems. These include:

Air quality: The Central Valley consists of one air basin, and so pollutants emitted in one part of the Valley can have an impact hundreds of miles away.

Water supply and distribution: Although many parts of the Central Valley depend heavily on groundwater, almost every community in the region is at least partly dependent on one water source: the drainage that flows into the Sacramento and San Joaquin Rivers and then through the Sacramento Delta. This water source is also used in many different ways by both state and federal water projects.

Transportation links: The Central Valley is connected internally and to other regions by a series of transportation links. Most obvious are the major freeway corridors, including Highway 99, Interstate 5, and Interstate 80, along with rail lines, which generally follow the Highway 99 corridor.

Land supply and cost: In virtually all parts of the Central Valley, land is cheaper and in more abundant supply than it is in coastal areas. This is one of the main reasons why population growth has shifted from the coast to the Central Valley.

At the same time, the Valley can be viewed as a group of five sub-regions, each with its own growth dynamic. These include:

North Valley: Seven counties in the northern portion of the Sacramento Valley remain rural and experience relatively little growth pressure compared to the rest of the Valley.

Sacramento Metro: Six counties around Sacramento have the highest rates of educational attainment and the highest wage scales anywhere in the Valley, largely because of the state capital, the University of

California at Davis, and proximity to the Bay Area. This has become a popular location for high-tech employers.

Stockton-Modesto-Merced: Traditionally a major ranching and agricultural area, these centrally located counties are now experiencing tremendous urban growth pressure because of Bay Area commuting, though they are not adding jobs as rapidly as Sacramento Metro.

Greater Fresno: Four counties near Fresno remain the agricultural heartland of the Central Valley. Though population growth rates are high, largely due to immigration and high birth rates, especially in the metropolitan Fresno area, the economy is only beginning to diversify and remains heavily focused on agriculture and related industries.

Bakersfield-Kern County: Somewhat separate geographically from the rest of the San Joaquin Valley, this area remains a center of both agriculture and extractive industries, especially oil. This region is experiencing rapid population growth and is the only part of the Valley that appears to be directly influenced by spillover growth from Greater Los Angeles.

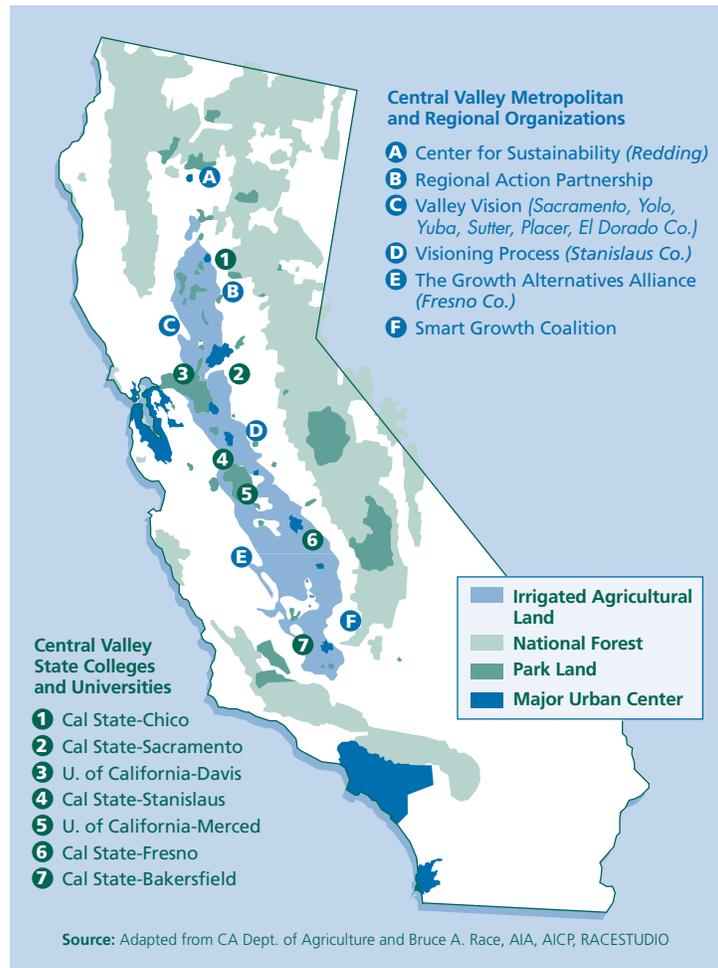
Underlying Issues

With so much urban growth on the horizon, the Central Valley's twenty-first-century landscape will be shaped by the interplay among several different issues:

Agriculture: Agriculture is likely to consume less land and less water in the future than it has used in the past, but it is still likely to be the sector that most determines the Valley's urban growth patterns. The critical issues are: What kind of agricultural base will the Valley have in the next century, and how much land and water will that agricultural base require? Recent trends have moved the Valley toward ever-higher-value crops, and competition with foreign markets is expected to be fierce.

Socioeconomic issues: The Valley has traditionally lagged behind the rest of California in social and economic indicators. Unemployment and teenage pregnancy are high, while household income and educational attainment is low. Like the rest of California, the Valley is rapidly evolving a unique mix of racial diversity. Although the Valley will soon get a boost from the creation of a new University of California campus in Merced County, the region's overall economic competitiveness may not be able to match its urban population growth.

Natural resources: In the rush to create one of the world's great agricultural regions, the Central Valley's leaders often overlooked the wonderland of natural resources that lay at their feet. For example, the Valley's vast system of wetlands, once one of the largest and most important in the world, has almost completely disappeared, much to the detriment of the migratory bird population. In the future, there will be increasing pressure to restore and enhance these natural resources even as the Valley continues to urbanize. The entire San Francisco Bay-Sacramento Delta ecosystem has emerged as the focal point of a massive state and federal effort to improve water quality and restore biodiversity.



Training Series on Community Planning

Infrastructure and infrastructure financing: When California's coastal metropolitan areas were created, mostly in the postwar era, the state and federal governments contributed greatly to their success by picking up the tab for most of the infrastructure they required. In the last two decades, however, all this has changed. In the Central Valley, the urban infrastructure is underdeveloped, and the financial ability of developers and new homebuyers to bear the full cost of community infrastructure is questionable.

Governmental structure and regional sub-regional cooperation: In the Valley as elsewhere, a wide range of local, regional, state and federal agencies make decisions that create the emerging landscape. But there is little history of cooperation among these agencies, and especially among local governments. If all these entities can work together well, they can effectively increase the region's "capacity" to create an urban environment that works for its users while protecting agricultural land, natural resources and other non-urban values. But if these entities do not establish a pattern of working together, the result could be a haphazard pattern of urban growth that does not serve any goal well.

Possible Strategies

Given these background conditions, the Central Valley could adopt any one of a number of strategies for shaping urban growth, or different parts of the Valley could "mix and match" from a variety of possibilities, which include the following:

Concentrate urban growth in existing urban centers. The Central Valley's urban centers are well established and well served by existing infrastructure. They contain most of the current job centers and community support services and amenities required for urban or suburban living. This strategy would concentrate urban growth in and near these centers through a combination of infill development and compact growth in new areas.

Adopt a "metroplex" strategy. This strategy would recognize that population growth in the Valley will be concentrated in a few large metropolitan areas. Urban growth needs, including urban centers, bedroom communities, parks and greenbelts, should be dealt with at the metropolitan level in a small number of distinct "urban metropolitan regions."

See **Central Valley** page 14

Again this year the American Planning Association and the Lincoln Institute are presenting a series of audio conference training programs on community planning. They are designed for planning commissioners, professional planners, elected and appointed officials, and their staffs to help them do better planning for their communities and to meet the challenges of political and technological changes in local land use planning. Presenters include public officials, land use attorneys, planners and planning consultants, policy analysts, and academic researchers.

The audio conferences are delivered over a speaker telephone to a group of any size. All programs are one hour in length and are held on Wednesdays at 4:00 p.m. Eastern Standard Time. Each registration site receives reading materials, an agenda, and instructions on joining the program and asking questions of the speakers. Tapes and transcripts of each program are optional. Fees range from \$80 per program to \$440 for all four programs.

October 13, 1999 Livable Communities and Sustainable Development

Livability is the buzz-word of the moment, but what does it mean in practical terms? The goal is for communities to achieve the perfect balance of a sound economy, attractiveness, amenities, social concern and environmental sensitivity. This program explores the meaning of these terms and examines how livability and sustainability are effectively integrated into community-level planning. From brownfields to clean water and from affordable housing to better transportation options, learn what communities are doing to actually achieve this goal.

December 1, 1999 Land Use Regulation and the Freedom of Expression

This program explores the community's obligation to address issues of freedom of religion and free expression. Constitutional law on these subjects is ever-changing. While communities may not like

their adult use businesses or big box houses of worship, do they have the right to regulate? As technology changes and as ethnic and religious populations fluctuate, community governance needs to adjust. This program examines the role of planning and the legal obligations of communities in this challenging environment.

February 9, 2000 Transfer of Development Rights Revisited

TDR started as a historic preservation tool in densely populated urban areas, but has been expanded for use in the conservation of agricultural lands and critically sensitive areas. Learn where this tool fits in the toolbox of community incentive programs. In this timely discussion, panelists will assess how well TDR has worked over time, in what situations it is most useful, and the potential it holds for helping communities preserve valuable resources and grow intelligently.

May 25, 2000 Urban Parks and Green Space

Are they a bellwether of community health? How are changing recreational habits, neighborhood demographics and city budgets affecting parks? Panelists explore the array of park and green space planning being conducted in urban areas. Find out what innovative approaches are being used for consensus building, design, park definition, environmental planning, sustainable management and financing. Explore the relationship between parks and the community's economic development. **L**

For more information and to register, see APA's website at www.planning.org/educlaudiocon.htm or contact Jerieshia Jones at APA at 312/431-9100 or email to jjones@planning.org.

Challenges to Property Tax Administration in Porto Alegre, Brazil

Claudia M. De Cesare

The property tax in Brazil is an annual tax on urban land and buildings administered at the local government level. The tax base is derived from market value and is standardized across different local authorities, although procedures for establishing the tax base and rates vary considerably.

In the city of Porto Alegre, the cost approach is the method traditionally employed for assessing real estate property for taxation purposes. No legal requirement exists concerning intervals between valuations, and the last general valuation took place in 1991. In years without valuations, the tax base has been readjusted uniformly according to prevailing inflation rates.

The property tax rates are progressive, with sliding rates for six classes of assessed values to insert an element of “ability-to-pay” into the system. The tax is calculated by the sum of each portion of the assessed value multiplied by the respective rate for that class. The maximum rate for residential property reaches 1.2 percent.

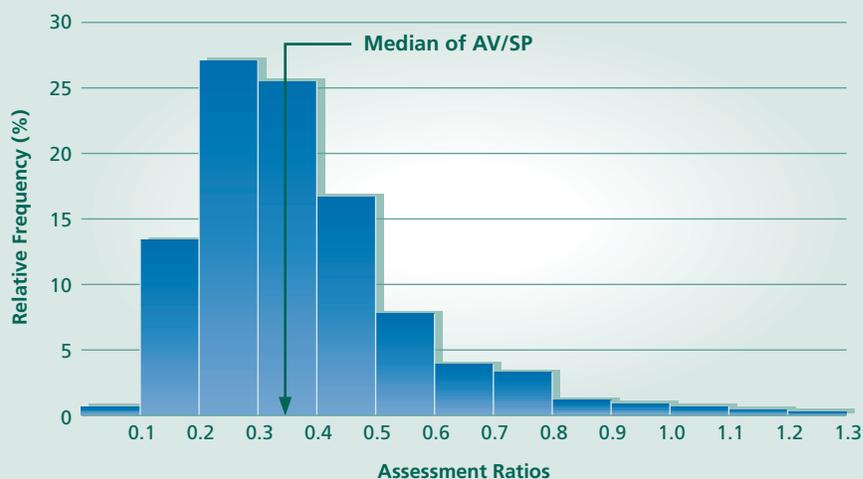
Analysis of the Current System

A recent analysis of the property tax system in Porto Alegre sought to provide a full examination of the relationship between assessed values and sale prices. Some of the results are summarized below.

Assessment level and uniformity:

Residential apartments in Porto Alegre were assessed on median at only 34 percent of their sale prices, much less than the statutory level of 100 percent. Using the coefficient of dispersion about the median [COD] of the assessed value to sale price ratio as a measure of variability, the results showed a low degree of assessment uniformity (approximately 36 percent). In Brazil, there are neither local nor national standards for evaluating assessment performance. By comparison, a commonly accepted degree of uniformity for single-family residential property in the United States is a coefficient between 10 and 15 percent. Figure 1 illustrates the ample spread of the assessment ratios in this study.

Figure 1:
Histogram of the Assessed Value to Sale Price Ratio (AV/SP)



Factors determining assessment inequity: To examine the simultaneous effects of the factors determining assessment bias, a multivariate model was used to investigate both vertical and horizontal inequities. The model detected a large number of factors causing systematic differences in assessment levels, including location attributes, building quality, building year, presence of elevators and similar variables. Vertical assessment regressivity was also identified.

Assessment method: It is plausible to assert that the method traditionally employed for assessing real property, that is, the cost approach, is a major cause of the lack of assessment uniformity identified in this study. Some theoretical weaknesses of the approach are associated with the extensive number of simplifications implemented by the local authority to make its application easier, and these adjustments are likely to have determined assessment bias. Inconsistencies with the standard cost model include the lack of connection between cost tables and the performance of the real estate market, and low correla-

tion between the ad hoc depreciation rates adopted and the reduction in price caused by age, obsolescence or deterioration of building structures. Furthermore, lack of systematic control over valuation performance seems to have contributed to the high inaccuracy of assessed values.

Time lags between valuations: The method used to make an overall adjustment to assessed values based on prevailing inflation rates for years without valuation has clearly contributed to the reduction of the tax base. For instance, properties were assessed on median at 38 percent of their sale prices in 1993, but only 27 percent in 1995.

Effective versus statutory rates of property tax: Rates for residential property are progressive according to six classes of assessed value. The effective rate results from the actual amount raised

from property taxation, without regard to tax evasion, divided by the sale price. The statutory rate results from the expected tax that could be raised per property, if the tax were established on the basis of sale price, divided by its sale price. The effective rate is much lower than the statutory rate and

Figure 2: Effective versus Statutory Property Tax Rates

MEASURE	RATE (%)	
	Effective	Statutory
Median	0.17	0.75
COD	56.87	18.26
Minimum rate	0.02	0.29
Maximum rate	1.18	1.15

represents on median only 0.17 percent of sale price.

Improper assessment practices have affected the distribution of the tax burden, not only because assessed values do not bear a consistent relationship to sale prices but also because many properties are classified incorrectly. The actual property tax revenue collected in the period under study represented approximately 25 percent of the potential revenue to be raised if assessed values were equal to sale prices.

Causes of Poor Tax Administration

Historical factors may help to explain the current poor administration of the property tax in Porto Alegre and its inefficient use as a revenue source. During the 1970s, large transfers of revenue from the central government and private estates to municipalities complemented the revenue raised at the local government level. Consequently, local authorities were not interested in collecting their own taxes, and taxpayers were used to paying insignificant property tax bills. The achievement of good performance in terms of valuation and an acceptable degree of assessment equity were secondary issues.

Recent financial crises combined with the urgent need for public investment in infrastructure equipment and services have stimulated some local authorities to improve their tax systems. However, due to the high visibility of the property tax and taxpayer antipathy, efforts to recover revenue and achieve assessment equity often result in tax revolts. Furthermore, changes in the tax base must be approved by locally elected members of the Chamber of Councilors. Whenever general valuations

are planned, the Council members are responsible for supporting capping systems in the name of protecting the poor and retired taxpayers. However, the capping systems actually favor high-income and wealthy taxpayers because low-income and retired taxpayers can receive relief based on their income.

Since 1991, two proposals for altering the property tax base in Porto Alegre have been rejected by the Chamber of Councilor because the estimated value of some properties would have been adjusted over the inflation rate at the time. However, the existing vertical assessment inequity means that high-valued properties are the ones benefiting from poor property tax administration.

Recommendations on Revising Practices and Attitudes

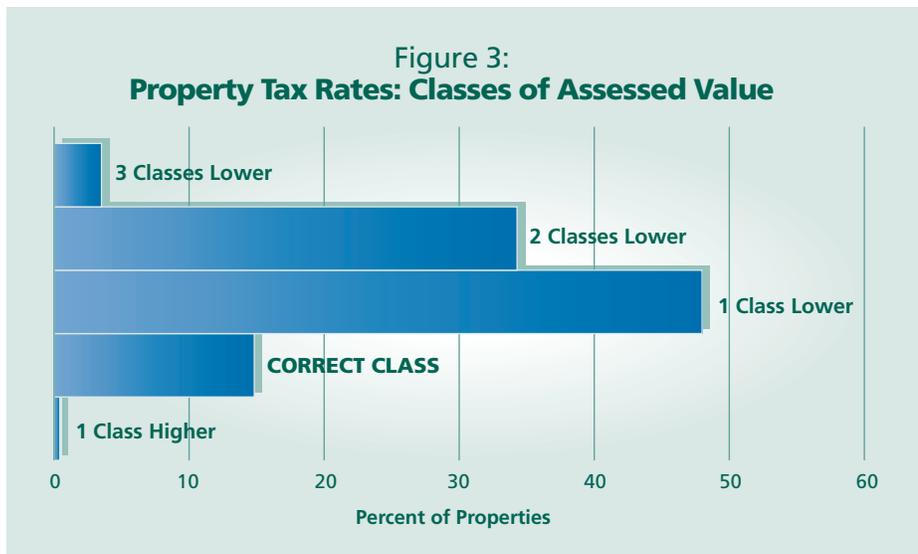
Knowledge about the weaknesses of a particular tax system is fundamental for its improvement, and the analysis undertaken in Porto Alegre provides greater understanding of the current system, the degree of assessment inequity and its main causes. For the first time, the drawbacks and weaknesses of the system are both quantified and measured, including which properties are benefiting from the system and the amount of revenue being lost. Now Porto Alegre has the opportunity to improve its property tax system on the basis of accurate data rather than political expediency.

Several measures would contribute to the overall equity of the tax system while also improving revenue collection to provide the community with higher standards of living:

- Reassessment of properties based on current market values using the sales comparison approach to assessing residential property, such as multiple regression analysis (MRA), artificial neural networks (NN), or multilevel modeling (hierarchical linear models —HLMs).
- Systematic control over assessed property values, including testing before the release of the valuation roll to recognize and adjust for eventual bias in the estimated tax base.
- Assurance of regular assessment updates.
- Establishment of market adjustments to assessed values based on ratio studies for years without valuation.
- Transparency in the administration of the property tax, especially in graduating the size of the tax burden, instead of overriding estimates of market values arbitrarily for this purpose.
- A definition of minimum standards for assessment performance at the local or national level.

The achievement of property tax equity and the provision of a high standard of public services are common goals for politicians, the community, administrators and others. Public officials need to take advantage of new technologies for property tax assessment and data gathering to make tax systems operate both efficiently and fairly. However, technical improvements are just a part of the process. It is also vital to work on public opinion. An important step is to encourage dialogue between community residents and politicians, showing the drawbacks of the current system and the consequences of keeping its structure. Confidence in the property tax system is likely to increase if revisions are discussed seriously in the public domain. **I**

Claudia M. De Cesare is an assessor in the Department of Local Taxation for the Municipality of Porto Alegre. She received a Lincoln Institute Dissertation Fellowship in 1999 to support the research reported here and in her Ph.D. thesis, which she completed at the University of Salford in England. The Lincoln Institute is continuing to develop educational programs with administrators, politicians, scholars and the community in Porto Alegre to help improve the equity and efficiency of the property tax system. Contact: Cmdecesare@smf.prefpoa.com.br



Mexicali: A Success Story of Property Tax Reform

Manuel Perlo Cohen

The case of Mexicali, the capital city of the border state of Baja California, Mexico, stands out as a good example of successful property tax reform in the 1990s. In only a few years the local government was able to raise revenues associated with the property tax, as well as strengthen its municipal finances and modernize its cadastral and collection systems. Furthermore, Mexicali carried out this reform by adopting a land value taxation system, the first of its kind in Mexico, and gained the public's acceptance for these changes. Without ignoring its problems and flaws, this case provides interesting lessons on future property tax reform endeavors in Mexico and other countries.

Economic, Political and Technical Considerations

Accomplishing property tax reform did not always seem to be an easy task in Mexicali or anywhere in Mexico. Since 1983, the local level of government has been responsible for setting up and collecting property taxes, although state authorities kept certain responsibilities. Throughout the 1980s, property tax revenues, and local revenues in general, experienced a severe drop caused by a combination of high inflation rates, economic recession, lack of political interest, and reduced administrative competence of local governments, which preferred to rely on revenue-sharing sources.

In the early 1990s, a clear improvement in the nation's macro-economic performance made conditions more favorable for change, although political and technical factors reduced the incentives for many state and local governments to embark on fiscal reform. Nevertheless, the federal administration of Carlos Salinas de Gortari (1989–1994) launched an initiative to improve local finances through a cadastre modernization program lead by BANOBRAS (Banco Nacional de Obras y Servicios), a public development bank.

Even before this program and other national policies began to exert an influence on local and state administrations,

Mexicali took the lead in property tax reform. Starting in 1989, the newly elected mayor, Milton Castellanos Gout, saw the importance of having strong local finances and wanted to raise revenues at the beginning of his term. He hired a private consulting firm to update cadastral values. The main consultant, Sergio Flores Peña, a graduate in city and regional planning from the University of California at Berkeley, convinced the mayor to change from a mixed-value tax base on land and buildings to a land value system, and to design a mathematical model to calculate land values.

Rather than being attracted by theoretical or ideological beliefs about the advantages of a land value tax, Castellanos was convinced that it would be the easiest and fastest way to raise revenues. He took the political risk of proposing a Municipal Cadastral Committee, including real estate owners' organizations, professional organizations and citizen representatives.

The results were spectacular in two ways: first, the new tax raised revenues quickly (see Table 1); and second, there was not a single legal or political objection from taxpayers. The increase in revenues from real estate property taxes and property sales, by far the most important source of local revenues, allowed the mayor to launch an important public works program. In the next fiscal year, however, he

wanted to loosen his fiscal grip, so he did not pursue land valuation updates and abandoned the mathematical model that was originally created for that purpose.

Opposition to updating land values came from both the Municipal Cadastral Committee and the government officials in charge of the cadastre and valuation office who lacked the technical capability to manipulate the model and feared that their power and control might be weakened by the participation of the private consulting firm. As a result, the mathematical model was abandoned and land values were subsequently defined by a process of negotiation and bargaining between local authorities, elected representatives and the committee. However, the land value taxation system remained as the base to establish land values.

At the same time, the Castellanos administration embarked on a cadastre modernization program with financial resources from the federal government. However, since the mayor saw that his main objective of raising revenues had been achieved, the efforts to modernize the cadastral system became a secondary priority that was not as successful.

In subsequent administrations, the policy towards tax revenues and cadastre modernization varied. The next mayor, Francisco Pérez Tejeda (1992–1995), was

Table 1: Property Tax Revenues in Mexicali, 1984-1998



Source: Secretaría de Hacienda y Credito Publico. Tesoreria del XVI Ayuntamiento de Mexicali. Instituto Nacional de Estadística, Geografía e Informática.

a member of the same political party (Partido Revolucionario Institucional, PRI). He experienced a drop in property tax revenue during his first year in office, and taxes only increased at the end of his administration. He abandoned the cadastre modernization program, but maintained the land value taxation system.

The next administration was led by Eugenio Elourdy (1995-1998), a member of the Partido de Acción Nacional (PAN). He was the first opposition party leader in Mexicali, although a member of PAN had governed at the state level from 1989 to 1994. During Elourdy's term, land values were updated, property tax revenues grew steadily and cadastre modernization was vigorously resumed. The current administration led by Victor Herмосillo (1999-2001) is continuing with cadastre reform.

Assessing the Mexicali Experience

There is no question that the process of fiscal reform has stimulated property tax revenues as the fastest and most important financial source for the city government. Currently, property tax revenues account for more than 50 percent of local municipal revenues. Mexicali is well above the state and national averages for the relative share of property tax revenues to total revenues (15.3 percent in 1995, compared to 8.4 percent at the state level and 10.3 percent at the national level). Local government officials in charge of the cadastre and valuation systems are well prepared with technical expertise and an awareness of the need to conduct permanent reform within the system. Mexicali's example has already been replicated in the rest of the state of Baja California and in the neighboring state of Baja California Sur.

The Mexicali case offers some important lessons. First, the property tax plays a central role in strengthening local governments, not only for raising sufficient revenues for urban development but also for providing government officials with the skills to organize the tax system in a way that can be sound, legitimate and transparent.

Second, property tax reform requires vision, leadership and, most of all, political will and commitment from the executive. However, successful reform to raise taxes also depends on a sound technical base and acceptance by the general public.

Third, the land value tax proved to be extremely helpful in achieving successful

reform at an early stage. It is clear that the rationale for adopting land value taxation had more to do with a pragmatic approach than with theoretical positions or debates over different schools of thought. However, this should not prevent government officials, consultants, scholars and the general public from thoroughly analyzing the diverse consequences of this approach in terms of economic efficiency, equity and administrative management.

Although a land value tax has proven to be successful in the case of Mexicali, it should not be viewed as a panacea for all situations. It is important to recognize that the tax can be of little help without other measures that have to be considered as part of property tax reform, such as cadastre modernization, clear policies on tax rates and public participation.

Finally, cases of property tax reform around the world cannot be viewed as black-and-white, success-or-failure experiences, but rather, like Mexicali, as stories that combine success, flaws and steps backward. Far from being a perfect example of property tax reform, Mexicali is a good learning experience. It shows that changes can take place in a field where often one thinks that little can be accomplished. **L**

Manuel Perlo Cohen is a researcher at the *Instituto de Investigaciones Sociales, Universidad Nacional Autónoma de México*. He received support for this case study from the *Lincoln Institute* and he has participated in numerous *Institute-sponsored courses and seminars throughout Latin America*. Contact: perlo@servidor.unam.mx.

On the Web

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¿Habla Español?

Estamos desarrollando una sección latinoamericana en nuestro sitio web donde hemos colocando siete artículos de *Land Lines* traducidos al español.

Marzo de 1999

"La expansión del uso de la tierra en Bogotá ¿Puede ser controlada?"

Carolina Barco de Botero y Ralph Gakenheimer

Enero de 1999

"La tierra vacante en América Latina"

Nora Clichevsky

Noviembre de 1998

"Perspectivas políticas comparativas sobre la reforma del mercado de la tierra urbana" **Gareth A. Jones**

Septiembre de 1998

"Instrumentos reguladores y fiscales para la captura de plusvalías: El caso de Santo André, Brasil" **Jeroen Klink, Luis Carlos Alfonso y Irineu Bagnariolli Jr.**

Julio de 1998

"Foro internacional sobre regularización y mercados de la tierra" **Peter M. Ward**

Mayo de 1998

"La regularización de la tierra urbana en Perú" **Julio Calderón Cockburn**

Marzo de 1998

"Nueva ley colombiana implementa la captura de la plusvalía" **Fernando Rojas y Martim O. Smolka**

Los siguientes informes realizados por investigadores latinoamericanos también han sido colocados en el sitio web. Estos trabajos han sido parcial o totalmente financiados por el Lincoln Institute.

Problemas periurbanos de tierra en la Parroquia Samán de Güere en Venezuela: Solapamiento institucional rural-urbano del mercado de suelo **Olivier Delahaye**

Acceso por los pobres al suelo urbano y mercado inmobiliario en Lima metropolitana **Julio Calderón Cockburn**

La reforma al sistema fiscal sobre la propiedad inmobiliaria en Mexicali: 1989-1998 **Manuel Perló Cohen y Luis R. Zamorano Ruiz**

Políticas de regularização fundiária: Justificação, impactos e sustentabilidade **Betânia Alfonsin**

Evictions and Human Rights: An Ethnographic Study of Development and Land Disputes in Bogotá, Colombia **Margaret Everett**

Ecological and Social Dynamics in Veracruz, Mexico

Mexico's geographic proximity, the historic complexity of its interdependent relationship with the United States, and changing immigration and socio-economic dynamics make it a fascinating country to visit and study, as six Loeb Fellows from the Harvard Design School discovered recently. Their trip in late May to Xalapa, the capital of the state of Veracruz, was the cul-



Loeb Fellows meet with some of their hosts at the University of Veracruz.

mination of a year of independent study under the auspices of the Loeb Fellowship Program. Through a structured exchange with academics and government officials facilitated by the University of Veracruz, the fellows explored policies and imperatives relating to sustainable development, public policy and planning, financing mechanisms for delivering affordable housing, and immigration issues.

The state of Veracruz is a microcosm of diverse ecological and social forces with both global and local dimensions, such as large-scale and rapid urbanization, deep social inequalities, discrimination in land ownership, the need for infrastructure development, concerns about environmental degradation and historic preservation, and changing economic conditions. The region's traditional dependence on the oil industry for local employment and international export was greatly diminished by the drop in oil prices in the 1980s. The impact of this change has been felt nationwide, creating an atmosphere that allows unplanned development in both the econ-

omic realm and the physical environment.

The city of Xalapa is facing this period of transition by attempting to redefine its social commitments and civic consciousness through innovative collaborations between the local and state governments and the university. An important priority is for new and upgraded housing to accommodate the fast-growing urban population.

As in most of Mexico, housing affordability and availability is inextricably linked to land use policies governing the disposition of vast tracts of rural "ejido" lands surrounding most urban areas. Tax burdens, the lack of available financing and the absence of strong planning and economic incentives from the government have all inhibited the opening up of this land to planned development. The ejido societies need help to strengthen their organizational capacity so they can explore the use of land trusts, cooperative ownership and other land management options to avoid the worst aspects

of urban sprawl and to provide housing for the poor in both urban and rural areas.

The state of Veracruz is poised to receive an enormous infusion of capital for infrastructure investments from national and international sources to be used for water, wastewater, energy and solid waste systems. Because these types of investments define a region's future development patterns, qualitative and quantitative criteria for their implementation should be carefully analyzed. The near- and long-term ecological, economic and social dimensions of these land-based investments will significantly alter the relationship between the state's urban and rural populations.

The Loeb Fellowship Program was established in 1970 through the generosity of John L. Loeb, Harvard College '24, to allow mid-career practitioners to undertake a year of independent study at the Design School and to help them gain additional knowledge and tools necessary to revitalize the built and natural environment. The fellows' travel to Mexico was supported in part by the Lincoln Institute. **I**

Loeb Fellows, 1998–1999

(*) Those who traveled to Mexico and contributed to this report.

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- **Kathryn E. Freemark ***
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- **Gustavo Leclerc ***
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Neighborhood Partners
Cambridge, Massachusetts
- **Gail Vittori ***
Co-Director
Center for Maximum Potential Building
Systems
Austin, Texas

Contact: Armando Carbonell, senior fellow of the Lincoln Institute and a former Loeb Fellow (armando@lincolninst.edu), or James G. Stockard, Jr., curator of the Loeb Fellowship Program (jstockard@gsd.harvard.edu).

Dissertation Fellowships

The Lincoln Institute's dissertation fellowship program supports Ph.D. students whose research focuses on some aspect of land use and tax policy. The program provides an important link between the Institute's educational and research objectives by supporting scholars early in their careers. These 20 students are receiving fellowships to pursue their thesis research during the 1999–2000 academic year. They are listed alphabetically by the program area that best fits their thesis topic.

Program on the Taxation of Land and Buildings

Asli Ball

*Faculty of the Built Environment
South Bank University, London*

Development Charges: Theory and British Practice



Development charges are contributions required by local planning authorities to grant permission for development. In Britain, the instrument for requiring development charges is established through planning obligations, the

main feature of which is negotiation between the local planning authorities, developers and landowners to determine the scope, scale and timing of the contributions. This investigation aims to determine whether development charges are economically efficient and equitable tools for land use planning and property taxation.

Claudia M. De Cesare

*Department of Surveying
University of Salford, England*

An Empirical Analysis of Equity in Property Taxation: A Case Study from Brazil



Major criticisms of property taxation are assessment biases in the tax base estimate and the possibility of a relatively higher burden placed on low-income taxpayers. Focusing on individual apartments, this study

analyzes equity in the property tax system in the city of Porto Alegre, Brazil. A multivariate model is used to investigate bias caused by a number of independent factors, including sale price. Property tax is also examined according to a measure of taxpayers' income. The implications of assessment bias on revenue and alternatives for reducing inequity are discussed.

Christopher W. Hoene

*Department of Politics and Policy
Claremont Graduate University*

Fiscal Stress, Land Use and Municipal Governance: Two Decades of California's Post-Proposition 13 Regime



Two decades after California voters passed Proposition 13, city governments continue to cope with its provisions and progeny. Today, fiscally strapped cities have few alternatives for raising revenues. One option is to increase tax revenues through development efforts targeting retail business. Another option is to impose fees, charges and assessments on city residents. This study examines the factors that determine how cities have used these options. Using a sample of 100 cities and a panel methodology from 1972–1997, the project seeks to provide insight into the relationships between fiscal policy, land use and municipal governance.

Program on Land Markets

Jerry Anthony

*Department of Urban & Regional Planning
Florida State University*

State Growth Management Regulations and Their Impacts on Affordable Housing



While growth management policies have considerable potential to improve the quality of life in the nation's communities, they could also impose additional social costs. This study examines the impacts of state-wide growth management regulations on housing affordability in the state of Florida. It uses three quasi-experimental research designs: an interrupted time-series analysis over a 20-year period; a hedonic model of housing prices before and after regulations were put in place; and an examination of changes in housing price distribution over the period. The findings will illustrate differences in impacts caused by supply constraints from those caused by increased demand, identify factors that can alleviate the impacts, and aid policymakers in lowering the social costs of growth management regulations.

Martin Bailkey

*Department of Urban & Regional Planning
University of Wisconsin-Madison*

An Interpretation of the Contexts within which Vacant Land is Assessed for Urban Agriculture

Urban agriculture advocates in the United States view food production as a viable use



for vacant parcels in post-industrial cities; however, municipal agencies involved with vacant land management tend to disagree. Non-profit organizations, often based in neighborhoods characterized by disinvestment

and blight, have successfully accessed vacant land for small-scale agriculture. Yet the policy contexts relevant to urban farming differ across cities. Case studies of cities with significant amounts of vacant land and active urban agriculture and community development movements will be used to outline a theoretical framework for this emerging issue in central city planning and land use.

Ciro Biderman

*Department of Urban Studies & Planning
Massachusetts Institute of Technology
and CEBRAP—Brazilian Center for Analysis
and Planning*

Modeling the Transport System, Land Prices and Living Conditions in Greater São Paulo

The demographic composition of the São Paulo Metropolitan Area (SPMA) has changed dramatically over the last few decades. Three significant factors are migration patterns, the population's spatial location and the distribution of the labor force among the manufacturing, industrial and service sectors. At the same time, the local and state governments have influenced growth patterns. This study will develop a model from studying the forces pushing people in and out of the city, such as the public transportation system, commuting times and urban land prices. By using the model to generate future data and contrasting it with actual records, this dissertation will propose policies that can improve the living conditions in the region.

Sarah S. Gardner

*Department of Political Science
City University of New York*

Green Visions for Brownfields: The Local Politics of Site Remediation and Redevelopment



In theory, state brownfields programs appear to be the ideal solution to the problems of environmental degradation and economic depression in older industrial cities. These programs seek to remediate contaminated sites

by devolving responsibility to local governments, loosening cleanup standards, and soliciting private sector investment. In practice, however, poor cities lack the organizational capacity to address their contaminated site problems adequately. Through a comparative study of the implementation of New Jersey's Brownfield Program in four distressed municipalities, this research focuses on the con-

straints that cities face in shaping brownfields redevelopment to benefit urban residents and communities.

Thomas O. Jackson

*Department of Landscape Architecture & Urban Planning
Texas A&M University*

The Effects of Environmental Contamination on Commercial and Industrial Real Estate



Environmental contamination can have significant effects on the market value of commercial and industrial real estate. These effects have implications for property taxation, brownfield redevelopment efforts and mortgage

lending. This research includes surveys that focus on the risk perceptions of real estate lenders and equity investors with respect to financing and investing in contaminated properties. It also examines statistical price models that analyze these effects, with sales price as a function of physical and economic property characteristics in addition to environmental condition.

Jean Marie Templeton

*College of Urban Planning & Public Affairs
University of Illinois at Chicago*

Water Policy in Illinois: Seeking the Path of Least Resistance



Water issues have been studied extensively in the Western states, but less research has been done in areas with more water resources. In Illinois, the technical aspects of water resources have been examined, but little research has

focused on the development of local water policy or, more importantly, its implications for land use decisions. This study examines the structure of intergovernmental relationships regarding water distribution in Illinois, and how these policy decisions impact land use in the Chicago metropolitan area. Particular attention is paid to how the shift from groundwater to surface water supplies affects land use patterns on the suburban fringe.

Austin Remy Troy

*Department of Environmental Science, Policy and Management
University of California at Berkeley*

An Assessment of the California Natural Hazard Disclosure Law



(AB 1195)

In 1998, California passed a hazard disclosure law (state bill AB 1195) requiring property sellers to inform potential buyers of several types of natural hazards that may affect the property, including flood, wildfire

and seismic hazards. This study aims to answer three questions: 1) What impact has this law had on markets for developed property? 2) What impact has it had on markets for vacant land? and 3) How do these effects vary with demographic indicators, including housing supply-demand balance and neighborhood socio-economic status? The study uses both hedonic analysis of housing prices and survey methods.

Program on Land as Common Property

David A. Chang

*Department of History
University of Wisconsin-Madison*

Race, Policy and the Politics of Land Ownership in Eastern Oklahoma, 1890-1950



This dissertation traces the history and politics of rural land tenure by Native Americans, African Americans and whites in Eastern Oklahoma. It seeks to determine the changing racial and gender distribution of land ownership in the

region, and to understand how that distribution was shaped by the allotment of tribal lands, property taxation and subsidized farm mortgage loans. The project examines claims of discrimination in these policies and traces how poor people organized politically in their efforts to keep or gain access to land.

Lewis W. Dijkstra

*Department of Planning & Public Policy
Rutgers University—The State University of New Jersey*

Public Spaces: Comparing New Jersey to the Netherlands



This research will assess the impact of different land use, transportation and tourism policies on public spaces in small cities and towns of New Jersey and the Netherlands. Six characteristics of public space will be analyzed: 1) its accessibility and proximity to other uses; 2) how many and what types of people use it; 3) its use restrictions; 4) its historic and authentic quality; 5) its ownership; and 6) whether the public can influence the governance of the space.

Vojislava Filipčević

*Department of Urban Planning
Columbia University*

Beyond Urban Trenches?: Neighborhood Politics and Power in New York City

The project examines how neighborhood politics may reflect on city-wide actors and institutions. Based on empirical qualitative research in New York City neighborhoods,



the project highlights the limitations of efforts that attempt to democratically empower neighborhood organizations in the “trenches,” independent of their influence on city-wide forces. In particular, it will examine immigrant

political incorporation, race and ethnic relations, inter-group conflict and cooperation, and the role of voluntary associations.

Andrea I. Frank

*Department of Urban & Regional Planning
University of Michigan*

Geopolitical Fragmentation: Implications for the Social Structure and Natural Environment of Urban Areas



This research explores the relationship between political fragmentation, social disparities and environmental conditions in urban areas in the United States. Comparative spatio-temporal analysis of urban areas

displaying different governmental structures is employed to determine whether politically fragmented regions are facing greater risks of social inequity and environmental decline. The research will provide a broadened perspective on the issue of political fragmentation and respond to the growing demand for sustainable urban development by contributing to the debate on the requirements for the governance of metropolitan regions under the sustainability paradigm.

Joongsob Kim

*Department of City & Regional Planning
Cornell University*

What “Other” Roles Design Reviewers Play and Their Effects on Design Review



This research aims to improve the current design review process in the planning departments of U.S. cities. Design reviewers have several significant roles that the current design review literature often overlooks, including con-

venor, facilitator, therapist and educator. Studying these four roles may offer important insights to improve the design review process. Case study research comparing design review examples in Boston, Seattle and Albany will investigate whether or not playing these roles has positive effects on the process, the outcome and the participants, as well as the larger community.

Richard K. Norton

*Department of City & Regional Planning
University of North Carolina at Chapel Hill*

**Mixed Motivations:
Local Commitment to Land Use Plan
Development and Implementation
in Coastal North Carolina**



How does local commitment to both the process and the goals of land use planning affect the development and implementation of land use plans? Focusing on land use planning required by the North Carolina Coastal Area Manage-

ment Act, plan development and implementation outcomes will be evaluated by analyzing the content of local CAMA plans and conducting surveys of local planning directors and county and city managers. Building on that analysis, case study communities will be identified and planning outcomes for those communities will be examined in depth.

Daniel Serda

*Department of Urban Studies & Planning
Massachusetts Institute of Technology*

**Remembering Place and Community:
Heritage, Empowerment and the
Politics of Neighborhood Revitalization**



Recent development initiatives in some inner city neighborhoods have focused on a combination of historic preservation and cultural tourism to strengthen community identity, empower neighborhood residents, and lay a foundation for economic and social revitalization.

This study will include interviews with private developers, public officials, and the staffs of community-based organizations in three such neighborhoods. The goal is to determine how heritage-based development complicates the politics of development while reshaping the physical and symbolic landscape of the inner city.

Rachel E. Wheeler

*Department of Development/Agricultural
Economics
University of Madison-Wisconsin*

**Property Reform Policy Choice
and Family Conflict in Albania and
Romania: Implications for Land
Use Rights**



Many of the economic and political considerations used to justify land reform choices in Albania and Romania since 1990 failed to adequately anticipate the severity and nature of property conflict that emerged. The twofold

purpose of this research is to develop the theoretical relationships between 'reform type' and 'nature of conflict,' and to empiri-

cally investigate how and why different reform choices in Eastern Europe are affecting farm-household tenure security. The research will also examine how this security is affecting production decisions on one hand and the legal institutional environment for land conflict resolution on the other.

Spencer D. Wood

*Department of Sociology & Rural Sociology
University of Wisconsin-Madison*

**Forty Acres of Freedom and the Last
Plantation: The Jeffersonian Path to
Citizenship in the Mississippi Delta,
1935-1998**



This community study explores the connections between land ownership and citizenship in the Mississippi Delta by relying on local land records, historical documents, statistical data and interviews. In the late 1930s the Farm

Security Administration (FSA) of the U.S. Department of Agriculture administered a land reform program that established 13 all-black agrarian communities and helped sharecroppers purchase their own farms. By planting the seeds of strong civic associations among a formerly disenfranchised and landless group, the FSA initiated a significant transformation of southern rural society.

Isaac F. Zama

*Land Tenure Center,
Development Studies Program
University of Wisconsin-Madison*

**Land Tenure Rights and Conflict
Management in Cameroon: A Case
Study of the Mount Kilum/Ijim
Community Forestry Reserve**



Cameroon is one of many African countries undertaking an experiment in sustainable use and management of natural resources through Community Based Natural Resources Management Projects (CBNRM). The Mount

Kilum/Ijim Community Forestry Project aims to develop a community forest for conservation purposes and eventually devolve control and benefits to local communities. However, some participants in these projects seem unaware of or willing to ignore the structural impact of more than 30 years of post-colonial land policies on local institutions and their ability to manage resources communally. This research seeks to use the Mount Kilum/Ijim case to examine the incompatibility between idealized CBNRM goals envisioned by a 1994 community forestry law and those of the contemporary villages around the reserve.

Institute Publishes 1999-2000 Catalog



The Lincoln Institute has published its annual catalog incorporating descriptions of three program areas and listings of all its courses and conferences, curriculum development and research projects, dissertation fellowships, and publications. This illustrated catalog offers a comprehensive overview of the Institute's mission and its activities for the current academic year.

If you wish to receive a copy of the 1999-2000 catalog, please email your request with your complete mailing address to help@lincolinst.edu. Please allow three to four weeks for delivery. Most sections of the catalog are also posted on our Web page (www.lincolinst.edu) for easy reference.

Curriculum Development and Research Projects

Lincoln Institute staff and fellows conduct research and develop curriculum materials on land use, land markets and land-related tax policies to provide the substantive foundation for the Institute's educational programs. The Institute also contracts with practitioners and scholars to encourage and support investigations that contribute to the body of knowledge about our primary program areas. The results of these projects, case studies and analyses are used to develop course modules and curriculum materials, and are published in a variety of formats.

Curriculum development projects funded for the 1999–2000 academic year are listed below alphabetically by principal investigator within program areas.



denotes research projects in the Latin American Program

Program on the Taxation of Land and Buildings

The program on the taxation of land and buildings deals with the feasibility, political acceptability, economic impact and appropriate use of value-based taxes on immovable property, with special attention to the valuation process. A variety of revenue instruments may be analyzed in these terms, particularly with regard to their recovery for public purposes of land value increments attributable to public investment. These include annual capital-value taxes, taxes based on rental value, taxes on increases in property value, and public charges, as well as fees, impositions and rental charges for land use and development.

While these instruments offer special benefits, they also face unique practical and political obstacles. Unlike an income tax, a capital-value tax is not withheld from salary, and unlike a sales or value-added tax, its annual accounting is highly visible to the taxpayer. The accountability and transparency thus achieved carry a heavy political price, particularly when owners face property tax increases that rise more rapidly than their cash income. Moreover, a capital-value tax requires the assessing body to estimate values for parcels that have not recently changed hands in a market transaction.

These complexities require that policy analysis encompass political, administrative and valuation issues, as well as the theoretical justification for the tax. The administration of the tax, and especially the valuation process, will critically affect its ultimate impact. This program area, therefore, approaches the taxation of land and buildings from many perspectives, including political theory, economic analysis and legal studies. It supports work by and courses for a wide range of experts and audiences, from academic theorists to property tax assessors, and from state tax judges to local land trust officials.

Policy issues related to the taxation of land and buildings include the impact and likely future of tax limitation measures, debate over the use of local taxes as a source of school finance, and efforts to promote environmental values by reducing taxes on open space. In the international sphere, taxes on land and buildings can offer special benefits to transition economies facing new regimes of property rights, privatization, decentralization and restitution. Comparative international experience also provides a rich array of alternative approaches to defining the public share of real property value.

Strengthening Local Property Taxes in South Africa: Current Practices and Challenges for the Post-Apartheid Era

Michael E. Bell, *MEB Associates, Inc., Kensington, Maryland*, and **John H. Bowman**, *Department of Economics, Virginia Commonwealth University*

Value Capture Financing Techniques: A Shift toward Land Taxation?

J. Thomas Black, *Lincoln Institute of Land Policy*

Tax Increment Financing: A Theoretical Inquiry

Jan K. Brueckner, *Department of Economics and Institute of Government and Public Affairs, University of Illinois at Urbana-Champaign*

Property Tax in Czech and Slovak Republics

Phillip J. Bryson and **Gary C. Cornia**, *Marriott School of Management, Brigham Young University*

Land Values and Taxation: New Challenges in the Chinese Transitional Economy

Chengri Ding, *Department of Urban Planning, Texas A&M University*



Improvement Tax Experience in Perú

Magarita Gamarra Huayapa, *Department of Urban Planning, National University of Engineering, Lima, Perú*

The Administrative Feasibility of Site Value Taxation

Thomas Johnstone, *International Property Tax Institute, Toronto, Ontario, Canada*

State Rules and City Property Tax Rules

Barbara Coyle McCabe, *School of Public Affairs, Arizona State University*, and **Richard C. Feiock**, *Askew School of Public Administration and Policy, Florida State University*

Limits on Local Property Taxes

Therese J. McGuire, *College of Urban Planning and Public Affairs, and Institute of Government and Public Affairs, University of Illinois at Chicago*

Evaluation of Michigan's Renaissance Zone Initiative

Gary Sands, *Urban Planning Program, Wayne State University*



Gentrification and Property Taxes: Comparative Study in Land Valuation

Joseph L. Scarpaci, *Department of Urban Affairs and Planning, Virginia Polytechnic Institute and State University*

The Property Tax as a Coordinating Mechanism: Internal Improvement Investment in Early Nineteenth Century America

John Joseph Wallis, *Department of Economics, University of Maryland*

A New Edition of "Our Land and Land Policy"

Kenneth C. Wenzel, *Takoma Park, Maryland*

Spillover Effects of Nonprofit Facilities on Neighboring Land Use: Implications for Tax Exemption and Zoning Policies

Julian Wolpert, Department of Geography, Public Affairs and Urban Planning, Woodrow Wilson School, Princeton University

Program on Land Markets

Land markets affect individual behavior, community character and the nation as a whole. We are interested in broadening our understanding of how land markets operate; the intended and unintended consequences of these market operations; options for improving their operation; and the effects of market interventions. The program focuses on four related themes. The first two, urbanization and real estate cycles, address the land market itself.

While it is impossible to understand the urbanization process without also recognizing labor and capital markets, global and technological forces, and socio-political institutions, our emphasis is on the role of land values and land uses. A major challenge is to make scholarly research on land markets accessible to policymakers and community-based organizations, and we are building on current work with state legislators and other public officials to provide useful information for their deliberations. A conference on land supply monitoring and GIS will enhance our ability to monitor and disseminate information on land markets to public and private stakeholders.

A second theme involves the causes and consequences of real estate cycles, such as inefficiencies in land supply, financing and construction. Some analysts argue that the Asian economic crisis is inextricably linked with national land policy and land markets. To advance our understanding of this issue, the Institute will be organizing two conferences on land market cycles and the causes of real estate booms and busts.

The other two themes, segregation and urban vacant land, focus on contemporary issues resulting from failures in the land market that have important policy implications. Segregation is both a reflection of and a contributor to land market inefficiencies. We seek to understand more about its causes and consequences, as well as tools to ameliorate segregation based on research and experience in the United States, Latin America and other regions.

Economic recovery and rising land prices have stimulated increased use of vacant and underutilized land, although lack of information, land assembly problems and preparation costs present significant obstacles to private-sector development. Furthermore, many abandoned urban sites are not competitive with suburban greenfields for industrial and commercial development. The Institute will continue to work with urban universities and community organizations for whom relocation is not an option to help them learn how to revitalize their neighborhoods.



Infrastructure, Environmental Degradation and Land Values: The Case of Tucuruí in the Brazilian Amazon

Henri Acsehrad, Institute for Urban and Regional Planning and Research, Federal University of Rio de Janeiro

Neighborhoods as Factories: How Urban Land Markets Create Productive Settings

Solomon Benjamin, Consultant, Bangalore, India

Government and Vacant Land: Creating Cityscapes

Ann O'M. Bowman, Department of Government and International Studies, University of South Carolina, and **Michael A. Pagano**, Department of Political Science, Miami University



Land Values and Urban Infrastructure Provision in Squatter Settlements in Lima, Perú

Julio A. Calderón Cockburn, Consultant, Lima, Perú

Efficient Urbanization: The Economic Productivity Implications of City Size, Urban Form and Metropolitan Mobility

Robert Cervero, Department of City and Regional Planning, University of California-Berkeley, and **Douglas Keare**, Lincoln Institute of Land Policy

Understanding Brownfield Redevelopment: What Determines the Use of Contaminated Land?

Margaret Dewar, College of Architecture and Urban Planning, University of Michigan; **Sabina Deitrick**, Graduate School of Public and International Affairs, University of Pittsburgh; and **Marie Howland**, School of Architecture, University of Maryland



Urban Land Management for Mobility: Santiago, Chile

Ralph Gakenheimer and **Christopher Zegras**, Department of Urban Studies and Planning, Massachusetts Institute of Technology, and **Juan Escudero**, National Center for the Environment (CENMA), Santiago, Chile

The Thinning Metropolis: Land Use, Land Values, and Population Decline in Mid-sized-Cities in the U.S. Heartland

William Goldsmith, **Ann Esnard** and **Rolf Pendall**, Department of City and Regional Planning, Cornell University

Inner Cities and Outer Cities: Aerial Photography and the Imaging of Urban Space

Dolores Hayden, School of Architecture, Yale University, and **Alex MacLean**, Landslides Aerial Photography, Cambridge, Massachusetts

An Empirical Investigation of Anti-Sprawl Policies within the Atlanta, Georgia, Metropolitan Region

Keith Ihlanfeldt, Department of Economics, Georgia State University

Urban Agriculture for Community Development Corporations

Jerry Kaufman, Department of Urban and Regional Planning, University of Wisconsin-Madison



Constructing the Sustainability Conditions of a Low Income Housing Market in the Rio de Janeiro Metropolitan Area

Luciana Lago and **Dayse Gois**, Institute for Urban and Regional Planning and Research, Federal University of Rio de Janeiro



Public Investments and Market Dynamics in Brazilian Slums

Helena Menna Barreto Silva, Laboratory of Housing and Urban Settlements, School of Architecture and Urbanism, University of São Paulo



Spatial Segregation and Exclusion in Latin America

Francisco Sabatini, Institute of Urban Planning, Catholic University of Chile

The Impact of Manufactured Housing on the Value of Adjacent Residential Properties Revisited: A GIS-Assisted Spatial Analysis

Guogiang Shen and **Mulatu Wubneh**, Department of Planning, East Carolina University



Access to Land and Municipal Land Taxation as a Means for Financing Urban Development

Daniela Simioni, Economic Commission for Latin America and the Caribbean (ECLAC), Santiago Chile

Densification Policies in Texas Colonias

Peter Ward, Institute of Latin American Studies, University of Texas, Austin

Commercial Property Values and Proximity to Light Rail: A Hedonic Price Model Based on Rental Data

Christopher Wornum and **Rachel Weinberger**, Cambridge Systematics, Inc.

Program on Land as Common Property

This program area is developed around five themes. The first, visualizing change, focuses on the development and application of techniques to enable participants in the planning process, including citizens, public officials and developers, to understand the likely results of planning and policy implementation. Teaching materials and courses present the effective application of visual tools and techniques, such as geographic information systems and three-dimensional simulation.

The topic of environmental foundations is concerned with the role of natural systems in shaping the land development process. A primary need is to familiarize professional planners, local planning officials, developers and landowners with basic ecological concepts and their applications. Planning practitioners and biologists will help the Institute develop an ecology primer and we will support a prototypical application of environmental science in land use planning.

The planning and design interventions theme deals with intentional efforts to affect the land development process to achieve specified goals, such as fostering sustainable development. A promising area for such interventions is found in the existing sprawl landscape, and we will work with the Regional Plan Association (RPA) to dev-

elop curriculum materials including a manual on "Reinventing Edge Cities," based on RPA's work in New Jersey and elsewhere.

Institutions and decision processes is a long-standing Institute focus area that seeks to improve planning systems and planning outcomes at the local, regional, state and national levels. Building on our existing growth management program for state planning directors from the northeastern United States, we will also develop a program for planning directors in the western states. A course on mediation of land use disputes will be offered for the first time, using new material developed under Institute sponsorship. We will also continue to present the course "Land Use in America," which has been designed for Environmental Protection Agency officials.

The land ethics and property rights theme acknowledges the importance of private property rights within a constellation of obligations to legitimate public interests. Program activities in this area include a series of seminars and course materials that bring together diverse and even polar perspectives on this value-laden theme. Some specific projects will address international experiences in leasing public land and the relationship between property rights and natural resources ownership in the context of environmental sustainability in a market economy.

Water Resource Planning for Environmental Zoning: Sustaining Resources through Growth Management

Pamela DiBona, Charles River Watershed Association, **Bennet Heart**, Conservation Law Foundation, and **Ezra Glenn**, McGregor & Associates, Boston, Massachusetts

Ecology, Conservation and Land Use: A Primer for Planners, Developers and Conservationists

Dan L. Perlman, Conservation Biologist, Newton, Massachusetts

Back from the Edge: Reinventing "Edge Cities"

Robert D. Yaro and **Robert N. Lane**, Regional Plan Association, New York



Land, Property Rights and National Resources Ownership in the Context of Environmental Sustainability in a Market Economy

Jorge Rabinovich, Program of Environmental Development and Research, Department of Research, Belgrano University, Argentina

Central Valley

continued from page 3

Create a "string of pearls" along Highway 99: For most of this century, Highway 99 has been the Central Valley's "main drag." Virtually all of the Valley's older urban centers are located along this corridor. One possible strategy would be to concentrate future urban development up and down Highway 99, creating a string of urban and suburban pearls. In point of fact, the string of pearls is already emerging in some places. New development districts are being created along the corridor to the north and south of existing cities and towns because of access to this major transportation artery.

Encourage the creation of new towns in the foothills on the west side of the Valley: The so-called "Foothill Strategy" has been discussed for several years in some parts of the Valley. Foothill new towns would place commuters closer to Bay Area jobs and protect prime farmland on the Valley floor. However, water and infrastructure finance issues make this strategy very difficult to achieve.

Permit the emergence of an urban ladder: A final possibility is to permit the development of what might be called an urban ladder: a network of urban and suburban areas that run up and down the Valley along Highway 99 and Interstate 5, and then run across the Valley on a series of east-west rungs along smaller roads that connect the two freeway corridors. In many ways, the urban ladder is the most likely possibility, simply because it connects existing cities and towns with probable new areas for urban growth by using the available transportation corridors. At the same time, however, it holds the potential to create more "suburban sprawl" than any other option.

Many of these options are already emerging as an actual urban pattern in certain parts of the Valley, and it is unlikely that there is a "one-size fits all" answer for the entire Valley. But, unless the civic leaders of the Valley confront the issue of urban growth head-on, it is likely that the Valley will adopt the sprawling and inefficient land use patterns that characterize Los Angeles and California's other coastal metropolitan areas.

There is still time to shape a different outcome in the Valley, if civic leaders work together in a conscious attempt to design a set of workable urban development patterns that will operate efficiently and effectively for urban dwellers, for employers, for agriculturalists, and for the natural environment. 

William Fulton is editor of California Planning and Development Report, contributing editor of Planning magazine, and correspondent for Governing magazine. Contact: bfulton@cp-dr.com or, for more information about the Great Valley Center, see www.greatvalley.org.

Recent Working Papers

Public Policy and "Rural Sprawl": Lessons from Northeast Ohio

This report presents an in-depth, micro-level look at land use and development in a traditionally rural but now rapidly growing county of northeast Ohio; it also explores the policy framework relevant to that development. Medina County, which lies southwest of Cuyahoga County and its central city of Cleveland, is experiencing rapid population growth and loss of farmland. Whereas residential development previously occurred in platted subdivisions in the cities or villages, construction of single-family homes on five-to-ten acre parcels on rural roads has greatly increased.

By default public policy has promoted unplanned growth. There is no official county-wide, much less regional or state-wide, perspective on development. While many residents do not like the growth they see, they are leery of larger level comprehensive planning. Without strong action by state and local governments, however, development will continue to "nibble" at Medina county's prime farmland. GIS-based analysis of the type used in this research may produce the evidence needed to build support for stronger public sector action.

Patricia Burgess is a land use consultant and researcher. **Thomas Bier** is director of the Housing Policy Research Program, at the Urban Center, Levin College of Urban Affairs, Cleveland State University. 1998. WP98PB2, 46 pp., \$9.00

Planning for Sustainable Development: Measuring Progress in Plans

This study sets forth a set of six principles that define and operationalize the concept of sustainable development. Using these six principles, a sample of 30 comprehensive plans is evaluated to determine how well the policies of plans support sustainable development. Findings indicate no significant differences in how extensively sustainability principles are supported between plans that state an intention to integrate sustainable development and those that do not. In addition, plans do not provide balanced support of all six sustainability principles, but rather support one principle much more than others.

Philip Berke is associate professor of Land Use and Environmental Planning at the University of North Carolina at Chapel Hill. **Maria Manta** is a doctoral candidate in City and Regional Planning at the University of North Carolina at Chapel Hill. 1999. WP99PB1, 32 pp., \$9.00

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|--|---|---|--|
| <p>1. Profession
(check one)</p> <p><input type="checkbox"/> Architect/Landscape architect/ Urban designer (20)</p> <p><input type="checkbox"/> Assessor/Appraiser (01)</p> <p><input type="checkbox"/> Banker/Lender (07)</p> <p><input type="checkbox"/> Business executive (11)</p> <p><input type="checkbox"/> Computer analyst/Specialist (02)</p> <p><input type="checkbox"/> Conservationist (04)</p> <p><input type="checkbox"/> Developer/Builder (05)</p> <p><input type="checkbox"/> Economist (06)</p> <p><input type="checkbox"/> Other social scientist (14)</p> <p><input type="checkbox"/> Engineer (19)</p> <p><input type="checkbox"/> Environmentalist (23)</p> <p><input type="checkbox"/> Finance officer (24)</p> <p><input type="checkbox"/> Government executive or staff (10)</p> <p><input type="checkbox"/> Journalist (08)</p> <p><input type="checkbox"/> Judge/Other judicial official (17)</p> | <p><input type="checkbox"/> Lawyer (09)</p> <p><input type="checkbox"/> Legislator/Council/Commissioner/Staff (13)</p> <p><input type="checkbox"/> Librarian/Archivist (16)</p> <p><input type="checkbox"/> Planner (12)</p> <p><input type="checkbox"/> Real estate broker/Agent (18)</p> <p><input type="checkbox"/> Tax administrator (15)</p> <p><input type="checkbox"/> Other (99)</p> <p>2. Type of organization/affiliation
(check one)</p> <p><input type="checkbox"/> Local/County government (LG)</p> <p><input type="checkbox"/> State/Provincial government (SG)</p> <p><input type="checkbox"/> Regional government (RG)</p> <p><input type="checkbox"/> Federal/National government (FG)</p> <p><input type="checkbox"/> Professional or Consulting firm (PC)</p> | <p><input type="checkbox"/> Business or industry (BS)</p> <p><input type="checkbox"/> Educational Institution (ED)</p> <p><input type="checkbox"/> Other nonprofit (NP)</p> <p><input type="checkbox"/> Student (ST)</p> <p><input type="checkbox"/> Other (99)</p> <p>3. Areas of interest
(check up to four)</p> <p><input type="checkbox"/> Capital financing (10)</p> <p><input type="checkbox"/> Economic/Community development (21)</p> <p><input type="checkbox"/> Ethics of land use (03)</p> <p><input type="checkbox"/> Governance and public management (30)</p> <p><input type="checkbox"/> Growth management (04)</p> <p><input type="checkbox"/> Housing (18)</p> <p><input type="checkbox"/> Land data systems (07)</p> <p><input type="checkbox"/> Land economics (09)</p> <p><input type="checkbox"/> Land law and regulation (11)</p> <p><input type="checkbox"/> Land policy: Int'l. comparisons (05)</p> | <p><input type="checkbox"/> Land and tax policy in Latin America (25)</p> <p><input type="checkbox"/> Natural resources & the environment (02)</p> <p><input type="checkbox"/> Open space (33)</p> <p><input type="checkbox"/> Public facilities and services (22)</p> <p><input type="checkbox"/> Real estate development (08)</p> <p><input type="checkbox"/> Rural planning (31)</p> <p><input type="checkbox"/> Tax policy: Int'l. comparisons (29)</p> <p><input type="checkbox"/> Tax and revenue systems (13)</p> <p><input type="checkbox"/> Transportation (23)</p> <p><input type="checkbox"/> Urban design (26)</p> <p><input type="checkbox"/> Urban planning (14)</p> <p><input type="checkbox"/> Valuation/Assessment/Appraisal (28)</p> |
|--|---|---|--|

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Taipei, Taiwan

Contact: iclpst@tpts8.seed.net.tw

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OCTOBER 13

Contact: jjones@planning.org

Urban Segregation and Value Capture Roundtables: Association of Collegiate Schools of Planning Annual Conference

OCTOBER 21-24

Chicago, Illinois

Contact: *Pat Jackson Gleason, ACSP, 850/907-0092, pgleason@acsp.org*

Real Estate Cycles

OCTOBER 22-23

Cambridge, Massachusetts

Property Tax Developments in Africa: National Tax Association Annual Conference

OCTOBER 24-26
Atlanta, Georgia

Contact: *NTA, 202/737-3325 or natltax@aol.com*

The Impacts of Electric Utility Deregulation on Property Taxation

OCTOBER 28-29
Cambridge, Massachusetts

Mediating Land Use Disputes

NOVEMBER 18-19
Cambridge, Massachusetts

Land Use Regulation and the Freedom of Expression: Audio Conference Training Series cosponsored with the American Planning Association

DECEMBER 1

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