

# **Report on the Maryland Planning Commission Training Course Requirement**

**Produced by the Maryland Sustainable Growth Commission with assistance from  
Maryland Department of Planning Staff**

**April 2013**

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## Current Training Courses

This section provides an overview of the online and live course currently offered by Maryland Department of Planning (MDP). It also includes an overview of training requirements in other states to be used as a basis of comparison.

### Maryland Department of Planning Training

#### *Online Course*

The online course is presented in five training modules: Planning 101, Planning 201, Maryland's Smart Growth Vision for the Future, Planning Commissioner module, and Board of Appeals Member module.

- Planning 101 is split into 'Introduction to Planning' and 'What is the Comprehensive Plan.'
- Planning 201 is split into 'Growth Management Tools' and 'Environment, Green Development, Housing and Transportation'
- Maryland's Smart Growth Vision for the Future covers the Smart, Green, and Growing legislation
- The Planning Commissioner and Board of Appeals Member modules cover the roles and responsibilities of those respective positions.

Each module is presented as a PDF document between 10 and 30 pages of text in length. Completion of a module occurs after the participant reads the accompanying material and completed a short review 'quiz.' The quiz does not have a pass/fail component. Participants who answer a question incorrectly are directed back the section of the document that contains the answer. Overall course completion occurs when all review quizzes are completed.

#### *Live Course*

The live course is presented as a three to five hour PowerPoint presentation that covers Planning 101, Planning 201, Law and Ethics, Planning Commissioner roles and responsibilities, and Board of Appeals roles and responsibilities. The live training was created as an adaptation of the online training manual. Therefore the content is very similar, with the main difference in the Law and Ethics module. Planning 101 and 201 are typically taught by a MDP staff member, Law and Ethics by a lawyer, and the roles and responsibilities courses by a current planning commissioner or board of appeals member. Occasionally topics such as 'How to Make a Motion' or 'How to Read a Site Plan' are included in the orientation training.

## Training in Other States

Eight states, including Maryland, require some form of training for ‘citizen planners,’ a group that includes any official appointed to a board that is involved with planning decisions. The other states are: New York, New Jersey, Tennessee, South Carolina, Kentucky, New Hampshire, and Louisiana. Citizen planner may be members of planning commissions, land use and planning boards, boards of zoning appeals or historic preservation commissions.

As would be expected, most trainings were required to cover roles and responsibilities, master plans, the development process, and zoning. Three states (Tennessee, Kentucky, and South Carolina) included a much more extensive list (i.e. telecommunications facilities, flood plain management, agricultural land conservation, etc.).

However, due to cost and time restrictions, non-basic topics in these states were typically relegated to continuing education courses and not included in orientation or initial training. Finally, New York, while providing a number of courses, also allows local jurisdictions to determine content that would fulfill the training requirement, as Maryland does.

### *Requirement*

Each of the 7 states mandated 4-6 hours of training for board members typically within 12 to 18 months filling the position. Four states (New York, Tennessee, Kentucky, and South Carolina) went further, mandating continuing education in subsequent years after the initial education was completed. New Jersey appears to be the only state to require a test at the end of the training course. However, some states, especially which training is online, have nonbinding “review questions” built into the course.

### *Enforcement*

Compliance mechanisms among the states ranged from no apparent penalty (Louisiana and Tennessee) to possible removal (Kentucky and New York). Other states (New York and New Jersey) prevented board members who didn’t receive training from being reappointed. Kentucky and New York, which allow removal of non-compliant members, also allow local jurisdictions to handle the certification process. Most states wrote into their law that board decisions could not be overturned because a member was not trained or removed for not being trained.

### *Delivery*

Three states (New York, Kentucky, and Louisiana) allow local jurisdictions to create their own training in addition to the state level training. Most states offer both live training and online training. Live training typically takes place at conferences (state APA, Municipal Association, etc.). Other states have lists of approved course providers that the local planning board can pay to come out to do training. The quality and diversity of online training materials differs vastly from state to state.

Most states have some written materials online. Four states (New York, South Carolina, New Hampshire, and Tennessee) have video or PowerPoint. New York has perhaps developed the most user friendly and interactive portal. Other states have simply posted video of previous, live trainings or PowerPoint with voiceover. South Carolina is unique in requiring that their online training be done in the presence of a live facilitator.

The research into courses in other states revealed four conclusions:

- Programs with extended course content are, at least anecdotally, better received and more utilized by local PC and BOA and even some elected officials
- Utilizing experienced trainers helps make courses more enjoyable to participants
- Partnerships are helpful in reach more people in geographically dispersed areas
  - Partnerships also allow access to more experienced trainers (i.e. university professors)
- Good online content is readily consumed by local PC and BOA

The screenshot displays an online course interface. At the top, the title "Planning Board Overview - Online Course" is visible, along with navigation links: "CONTACT DOS", "E-LEARNING TIPS", "GLOSSARY", "ATTACHMENTS", and "EXIT". The left sidebar features the New York State Department of State logo and the text "DIVISION OF LOCAL GOVERNMENT SERVICES" and "LAND USE TRAINING & TECHNICAL ASSISTANCE PROGRAM". Below this is a "Table of Contents" with 32 items, including "1. Planning Board Overview", "2. Measuring Your Pre-Course Knowledge of...", "3. Planning Board Membership", "4. Training Requirements", "5. Advisory Powers of the Planning Board", "6. Comprehensive Plans", "9. Regulatory Powers of the Planning Board", "13. Meetings and Hearings", "14. Meetings of the Planning Board", "17. Public Hearings of the Planning Board", "18. Making Legally Defensible Decisions", "19. County Planning Agency Referral", "22. State Environmental Quality Review (SEQ)", "24. Make Findings That Support Actions", "26. Taking Action on Applications", "28. File Decisions", "29. Challenging a Decision of the Planning Board", "30. Measuring Your Post-Course Knowledge", "31. New York Department of State", and "32. New York Department of State". The main content area shows the "NEW YORK STATE DEPARTMENT OF STATE" logo and the text "LOCAL GOVERNMENT SERVICES" and "PLANNING BOARD OVERVIEW". At the bottom, there is a control bar with a speaker icon and a play/pause button.

Figure 1: Screenshot of an online course module by New York's Department of State

## Completion Rate Analysis

Data currently maintained by Maryland Department of Planning shows a completion rate of 63% among the 1447 people currently listed as members of planning commissions, boards of zoning appeals, planning boards, and (a few) historical preservation commissions. Planning commissioners and board of zoning appeals members have similar completion rates, 64% and 62% respectively. Also, county level and municipal level boards show similar rates, 66% and 62% respectively.

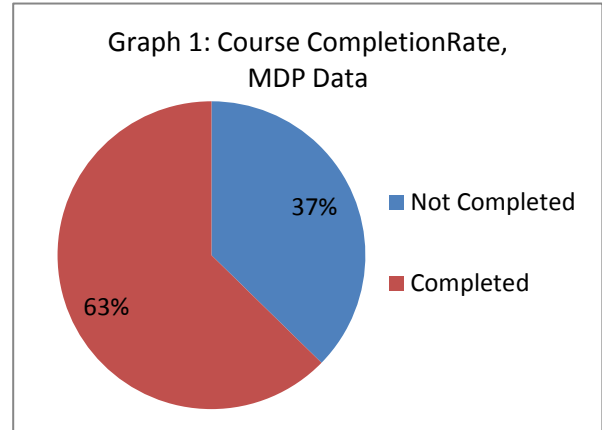


Table 1 shows the regional variation of completion rates.<sup>1</sup>

Table 1: Completion Rates by Region

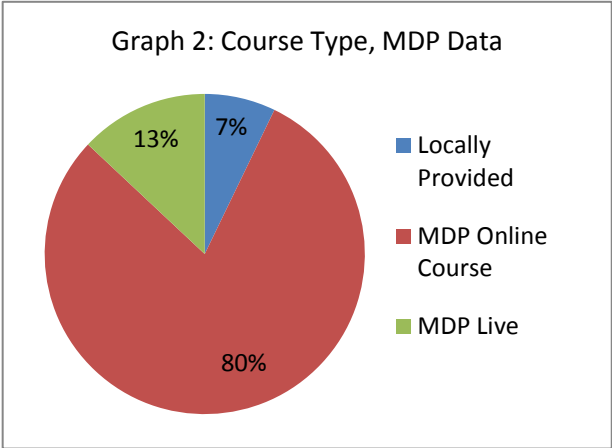
Region	# of Obs.	All			Planning Commission			Board of Zoning Appeals		
		% MDP	% Local	Total	% MDP	% Local	Total	% MDP	% Local	Total
Western	239	54%	2%	56%	50%	3%	53%	60%	0%	60%
Baltimore	235	62%	2%	64%	64%	3%	66%	60%	0%	60%
Southern	95	75%	0%	75%	82%	0%	82%	68%	0%	68%
Upper Eastern Shore	359	52%	12%	64%	49%	13%	62%	55%	11%	66%
Lower Eastern Shore	253	61%	2%	63%	67%	2%	69%	57%	2%	59%
Suburban Washington	266	59%	3%	62%	60%	4%	63%	60%	2%	62%
<b>Total</b>	<b>1447</b>	<b>58%</b>	<b>4%</b>	<b>63%</b>	<b>58%</b>	<b>5%</b>	<b>64%</b>	<b>59%</b>	<b>3%</b>	<b>62%</b>

Regional variations were greatest among planning commissions, ranging from 53% in the Western region and 82% in the Southern region. Board of zoning appeals completion rates were closer together with four out of six regions posting between 59% and 62% and the Southern region posting 68%. Most regions were consistent between their county level and municipal level completion rates, except for the Western region which showed a 76% completion rate among county level planning commissions and a 50% completion rate among municipal level ones.

<sup>1</sup> Regions are those defined by Maryland Department of Planning, which lists six regions: Western (Garrett, Allegany, and Washington Counties); Baltimore (Baltimore City and Baltimore, Harford, Carroll, Anne Arundel, and Howard Counties); Southern (Calvert, St. Mary's, and Charles Counties); Upper Eastern Shore ( Cecil, Kent, Queen Anne's, Talbot, and Caroline Counties); Lower Eastern Shore ( Dorchester, Wicomico, Somerset, and Worcester Counties); and Suburban Washington (Frederick, Montgomery, and Prince George's Counties)

Overall local training was only recorded as a significant factor in Upper Eastern Shore jurisdictions, where 12% members completed a local course. Southern planning commissioners and board of zoning appeals members show no local training completed. The other regions posted 2% or 3% of members.

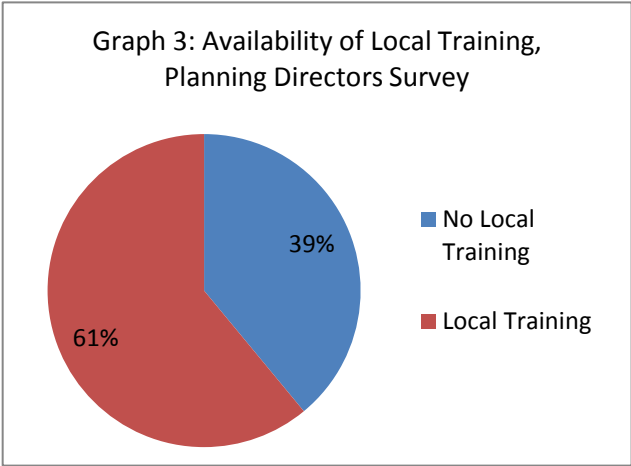
MDP data shows that of those that completed the training, 80% did so online. The majority of those people completed the training in the six months following the 2009 law’s passing. Since the 4th quarter of 2010, between five and twenty people completed the training online per quarter. See Appendix D for more information.



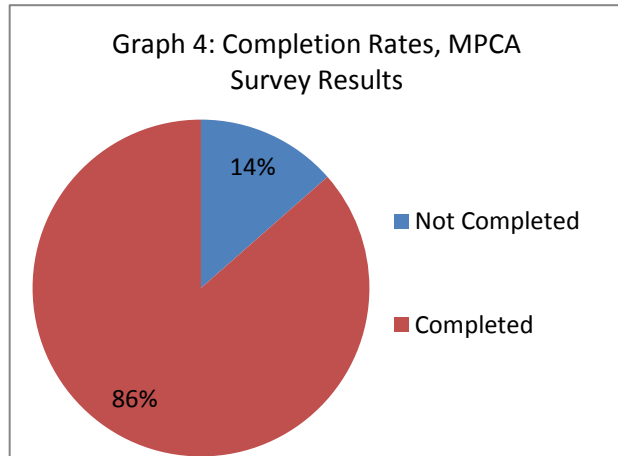
Possible Data Errors

There are several reasons to believe that the completion rate is being under reported. First of all, the MDP database is updated infrequently and relies heavily on self-reporting by local jurisdictions. A review of 65 municipalities and 24 counties<sup>2</sup> revealed a total of 149 people in the database that no longer served and 106 people that are currently serving but not in the database. Those 89 jurisdictions had a total of 950 entries. In other words, 16% of the entries were incorrect and 12% of the people who should be in the database weren’t. If these errors were similar across the data, then an estimated 227 people are in the database that should not and 166 people are missing from the database. These are significant error rates.

Second, local training is significantly under reported. A survey of planning directors from across Maryland in preparation of the 2012 Winter Planning Director’s Roundtable revealed that 61% of planning directors provide some type of local training. Of those jurisdictions with local training, 65% reported providing it ad-hoc for new members and 42% reported providing it upon request. Only 15% reported providing a consistent training for new and old members. The ad-hoc nature of local training means that it is difficult to track and is therefore most likely under reported.

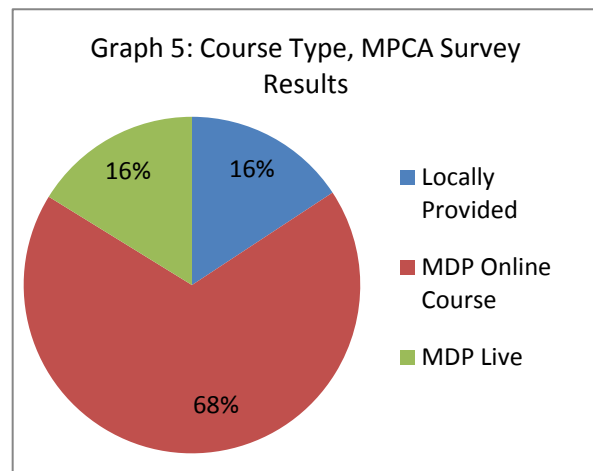


<sup>2</sup> Baltimore City is included with counties



Finally, results from a survey of Maryland Planning Commissioner Association members indicate that both local training and training rates are underreported. Eighty-six percent of respondents report completing the training, with board of zoning appeals members and planning commissioners reporting 88% and 89% respectively. Of the people who said they received training, 16%, or more than double the rate gleaned from MDP data, indicated they received local training. Sixty-eight percent said they took the online training, a rate much lower than is recorded in MDP data.

The discrepancies between the rates reported by MPCA members and MDP data are most likely the result of the difficulty in collecting information on local training and the infrequency with which data is collected. The difference in the online completion rates in survey results and MDP data highlight this point. People who complete the survey online are immediately entered into the database. A system that has such differences in recording mechanisms will inherently favor the most accurate recording mechanism, which in this case is online.





## Survey Results Concerning Course Material and Delivery Methods

### Delivery Methods<sup>3</sup>

Table 2: Delivery Method Ranking by MPCA Members

	First Choice		Second Choice		Third Choice		Score
	#	%	#	%	#	%	
Interactive Classroom <sup>4</sup>	44	26%	17	10%	26	17%	192
Online Materials	54	32%	52	32%	21	14%	287
Printed Materials	26	15%	39	24%	43	28%	199
Traditional Classroom Setting	22	13%	21	13%	24	16%	132
Webinar	25	15%	32	20%	34	23%	173
Other	0	0%	1	1%	3	2%	5
Total	171		162		151		

Table 2 shows the rankings of possible delivery methods by MPCA Members. ‘Online materials’ was ranked as the most desirable delivery method, followed by ‘printed material’ second and ‘interactive classrooms’ a close third.

Table 3 compares responses from planning commissioners and board of appeals members. Boards of appeals members were slightly more favorably disposed than planning commissioners towards interactive classrooms. Overall though, the discernible groups ranked the different delivery methods in a relatively consistent order: Online materials as the most favored, interactive classrooms and printed materials in the middle, followed by webinars. While some individuals ranked traditional classrooms as the preferred choice, almost every group placed it last.

<b>Board of Appeals</b>		<b>Planning Commission</b>	
Method	Score	Method	Score
Online Materials	127	Online Materials	132
Interactive Classroom	92	Printed Materials	96
Printed Materials	91	Interactive Classroom	84

Table 3: Delivery method rankings by organization type

Planning directors were asked a slightly different question: “How is local training delivered?” The choices were online materials, printed materials, lecture, video or other multimedia, group discussion, one-on-one, or other. Fifty-nine percent reported using printed materials and 38% reported using online materials. In a separate question, thirty-four percent responded that they direct commissioners to complete MDP’s online training.

<sup>3</sup> For further results, see appendix B and C

<sup>4</sup> ‘Interactive classroom’ was distinguished in the survey from ‘traditional classroom’ by the inclusion of active elements into the presentation. The active elements, as informed by the literature on adult education, included discussions, case studies, games, role-playing and scenarios

Course Topics<sup>5</sup>

Table 4: Course Subject Rankings by MPCA Members

	First Choice		Second Choice		Third Choice		Score
	#	%	#	%	#	%	
Capital Improvement Planning	15	6%	11	5%	15	7%	82
<b>Comprehensive Plans</b>	<b>49</b>	<b>21%</b>	<b>30</b>	<b>14%</b>	<b>28</b>	<b>13%</b>	<b>235</b>
Development Process	12	5%	20	9%	20	9%	96
Meeting / Public Participation	9	4%	23	10%	19	9%	92
Non-Conforming Uses	17	7%	31	14%	33	15%	146
<b>Planning Law</b>	<b>40</b>	<b>17%</b>	<b>24</b>	<b>11%</b>	<b>33</b>	<b>15%</b>	<b>201</b>
Subdivision Regulation	4	2%	13	6%	16	7%	54
<b>Variances and Special Exceptions</b>	<b>58</b>	<b>25%</b>	<b>30</b>	<b>14%</b>	<b>30</b>	<b>14%</b>	<b>264</b>
Zoning Code	27	12%	40	18%	25	11%	186
Other	1	0%	0	0%	0	0%	3
Total	232		222		219		

The table 4 shows rankings of possible course topics by MPCA members. Variances and special exceptions, comprehensive plans, and planning law were the top rated choices, receiving a combined 63% of first place votes.

Table 5 compares responses from planning commissioners and board of appeals members. Planning commissioners and board of appeals members differed in their top two choices, but agree for their third choice. Planning law, which is the top choice among planning commissioners, places sixth among board of zoning appeals members. Conversely, non – conforming uses was ranking higher by board of zoning appeals members but lower by planning commissioners (7<sup>th</sup>). These differences may reflect the difference in the perceived duties of their respective positions.

Board of Appeals		Planning Commission	
Subject	Score	Subject	Score
Variance and Special Exception	177	Planning Law	159
Non- Conforming Uses	81	Comprehensive Plans	156
Zoning Code	59	Zoning Code	115

Table 5: Course subject rankings by organization type

Planning directors were also asked to select and rank the top three most important course subjects for planning commissioners and board of appeals members. The top three courses were zoning code, variances and special exceptions, and the comprehensive plan, reflecting a hybrid of topics selected by planning commissioners and board of appeals members. Interestingly, planning law, the top overall choice by MPCA members, didn't receive a single vote by planning directors.

<sup>5</sup> For further results, see appendix B and C

## Survey Results Take-aways

The following three conclusions are drawn from the results of MPCA and planning director's surveys:

### 1. Course content that emphasizes the basics of planning and zoning tools

The high rankings of planning law, comprehensive plans and variances and special exceptions indicate a desire for more content that covers planning implementation tools. More advanced topics such as capital improvement planning received low scores and almost none of the respondents listed separate topics than those listed. Furthermore, public participation results were mixed, indicating that commissioners are more interested in understanding tools than were uncomfortable interacting with the public.

### 2. The use of self-study materials

In general, MPCA members indicated a desire to receive training at their own discretion. In addition to the high rankings of online and printed materials, seventy percent of respondents reported being comfortable and willing to complete training online. The results were only slightly different between paper and online responses (68% and 71% respectively).

The survey of planning directors also reported a high use of printed and online materials, and comments made during the Winter 2012 Planning Director's Roundtable revealed a desire for materials that could be used at the planning directors pleasure.

### 3. More interactive presentations

The traditional classroom setting received the lowest score and interactive classrooms received a top score. This result is consistent with Malcolm Knowles's theory of andragogy which emphasizes connecting adult learners to course material and treating them more independently than younger learners. Also, only 25% of online participants reported preferring the standard lecture format with 75% preferring slight to extensive changes to the course format.

## Recommendations

To augment the effectiveness of planning commissioner and board of zoning appeals member training, Malcolm Knowles theory of adult education, andragogy, is included at relevant points in the recommendation. Andragogy, which translates from Greek as ‘to lead the man,’ refers to self-directed learning designed to engage adults who need strong internal motivation and an understanding of a course’s practical goals in order to learn new concepts. Malcolm’s theory stresses a connection to past experiences, a demonstration of the relevancy of course materials, and the instructor as a ‘guide’ more than a ‘teacher.’ This research influenced a number of the report recommendations.

The overall conclusion is a need to increase course accessibility and relevancy. The easier it is to complete training and the better the courses are received by participants, the more commissioners will seek out courses. The recommendations are split into two categories: those that improve quantifiable knowledge and those that improve course quality.

### Recommendations to better understand the completion rate

#### 1. Improve data collection at the local level

Analyzing completion rates requires solid information on individual participants. The current data is unreliable and a better mechanism is needed to account for a local commission’s turnover. A better collection mechanism would allow for constant updates to the database by contacting planning directors when new commissioners are appointed. This should be done in addition to the current system of annual updates that MDP employs.

The proposed data collection mechanism would function similarly to Maryland National Capital Park and Planning Commission collection of Montgomery County Homeowners and Civic Associations.<sup>6</sup> The current members of a jurisdictions’ commission or board would be published on MDP’s website. The local planning director (or whoever is designated by the jurisdiction) would have the ability to update the information for his or her jurisdiction.

The screenshot shows a web form with a 'Send Affirmation Email' button at the top. Below the button are four main sections: 'Association Information', 'Contact 1', 'Contact 2', and 'Contact 3'. Each section contains several input fields for text and a 'Phone' field. The 'Association Information' section includes fields for Name, Code, Website, and a larger Comments field with a scroll bar. The 'Contact' sections (1, 2, and 3) each have fields for Name, Position, Email, Address, and Phone.

Figure 2: Example from MNCPPC website

Better data collection should also include information of different variables than what is currently collected. County or municipality, planning commission or board of appeals member, and some jurisdiction information is all that is currently available. Given the little variation in these variables, new ones should be introduced if the completion rate is to be explained comprehensively.

<sup>6</sup> See <http://www.montgomeryplanning.org/gis/interactive/hoa2.shtm>

Possible variables that might explain differences are:

- Access/use of the internet
- Funding availability for travel to conferences
- Frequency of commission meetings
- Number of annual/monthly decisions made by commission or board.
- Frequency of Comprehensive Plan update
- Presence of full time planning staff

## 2. Create a feedback mechanism

Feedback would collect information on how to constantly improve trainings and what types of courses MPCA members would want to see covered. Such a mechanism would allow for continual refinements to the course and help create a subjective standard on the quality of the course.

## 3. Develop pre and post questions for each training module

Asking questions to start the course will help lay out the learning objectives of the particular module. Participants will clearly see at the onset of the module that they will gain specific knowledge that they currently don't have.

Also, by asking the same set of questions pre and post training module, New York's online course was able to directly measure the amount of knowledge gained specifically by the course. In evaluating the effectiveness of planning commissioner education, it is difficult to build a specific mechanism that can measure the impact of courses. A jurisdiction by jurisdiction evaluation of the change in the quality of planning decisions is essentially impossible.

*Andragogy - The Need to Know: Adult learners need to be shown the value of the material and its practical applications beforehand. Adult learners see their time as valuable because of the opportunity costs associated with any particular decision. Effective courses demonstrate the benefits of taking the course and the consequences of not to justify the adult's investment of time. (Tough 1979, Ozuah 2005)*

Asking course participants if the training was useful would help, and should be included, but is subjective. Asking a series of questions pre and post course on the facts of the planning process and planning law in Maryland offers the best avenue to determining the effectiveness of training because it allows for determining if the course had an impact on the participants knowledge.

## Recommendations to Improve Course Accessibility and Relevancy

### 4. Create a voluntary, continuing education program

*Andragogy - Learning Guidance:* Knowles believed that they are less interested in learning for distant or future uses. Adults typically seek out courses that will have an impact on their present professional life. To this end, courses need well-articulated goals and objectives with action steps to meet those goals. Beyond connecting the goals of the course, adults need to see that they will walk away with some skills or knowledge that will help them in their daily interactions or help them make decisions.

An ad hoc continuing education already exists with advanced topics presented at conferences and workshops. The recommendation here is to essentially formalize what is already being done. Create a continuing education program with three to five subject areas (i.e. planning law). Each continuing education course would fall under one of the subject areas. Subject areas and courses should be determined jointly by MPCA and MDP and take into consideration feasibility of the presentation and planning commissioner preferences as expressed through the MPCA member survey.

During workshops and conferences, continuing education courses that expand upon the basic planning and zoning education would run concurrently with orientation training. Members who have completed the required orientation training would be invited to participate in the continuing education courses.

To encourage participation, continuing education could be a part of some type of “degree” program. The orientation courses could qualify someone as a “bachelor’s” of citizen planning. Completion of a certain number of continuing education courses would qualify someone as a “master” citizen planner. The precise structure of such a program should be jointly developed by MPCA and MDP.

### 5. More online content, specifically videos to make training more enjoyable

MPCA and MDP should improve upon the online training modules by making them more interactive. Video, review questions, “assignments,” slides, and course readings can all be used in each individual module. The modules should range in time from twenty to forty minutes with longer topics split into several modules.

The New York Department of State and the University of New Hampshire provide the best models for possible modules. The images in

*Andragogy - The Learners Self-Concept:* Knowles argued that adulthood “is that point at which [a person] perceives himself to be wholly self-directing. And at that point he also experiences a deep need to be perceived by others as being self-directing.” (Knowles et al., 1998) This means that adult learners need to be seen as able to conceive of and self-direct their studies.

appendix E provide a visual representation of these models. Essentially, a narrator walks the participant through the modules, providing information similarly to a live presentation. Short, relevant videos are shown, such as a commission meeting. Images such as maps or plats are also shown to illustrate a particular point.

Both New Hampshire and New York's modules utilize review questions throughout the presentation to check knowledge diffusion. New Hampshire even included assignments in the middle of modules that the participant was expected to print out and complete before continuing.

Posting video of presentations can be an easy way to accumulate interactive content. While not as desirable as building training modules, it allows individuals interested in a particular topic but unable to attend a live training. Review questions can be integrated into the video/posting and completion of the questions would fulfill a continuing education credit.

#### 6. Utilize interactive elements during live presentations

Incorporate discussions, case studies, scenarios, role-playing, and problem based learning into the orientation training and each continuing education training course. Ideally, each live training course would select an interactive element to be used during the course. Selection would be left up to the individual presenter.

A list of potential elements should be developed to make it easier to select the appropriate element for a particular presentation.<sup>7</sup> The list can form the beginning of a "library" of potential elements and the necessary materials for them. Utilizing course feedback (recommendation 2) MPCA and MDP can maintain the perceived successes or failure of a particular element.

*Andragogy - The Learners Role: Adult learning should engage with the prior experience of the learner. These experiences can be the richest, most practical resource available (Ozuah 2005) Planning Commissioners have a wealth of knowledge and experience deriving from their work, family, social interactions, and school. Instructors need to draw out relevant experience and connect it to the material being taught. (Lieb)*

#### 7. Establish/expand partnerships among similarly oriented agencies

Possible Partnerships: MML, MACo, UMD Extension (Institute for Government Services and Research, Academy for Excellence in Local Government), MD APA, and other state agencies.

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<sup>7</sup> See appendix A for a list of possible elements discovered in the course of research into adult education.

Partnerships serve several purposes: they expand the audience receiving planning training, they provide more forums for MPCA members to receive training, and they provide a network of seasoned trainers to deliver training. The 2009 law only requires commissioners and board of appeal members to receive training, but many people are involved in the planning process. Planning decisions overall could be improved if elected officials and citizens were better informed about the planning process.

Organizations such as MML and MACo already run annual and regional conferences and MPCA and MDP have previously run the orientation training at these conferences. The partnerships should work in both directions, with MML and MACo provided the opportunity and invitation to present topics pertinent to planners but more under the purview of a municipal or county association.

Several Maryland State Departments should also be invited to present topics at MPCA conferences. Departments such as Transportation, Environment, and Housing are intimately involved in the planning process and developmental decisions of local jurisdictions. They would bring a valuable perspective and could help supplement course development by MPCA and MDP.

The establishment and maintenance of partnerships would lie with the MPCA Executive Board but with assistance from MDP.

8. Evaluate the success of these recommendations in two years

Planning commissioner and board of appeals member education should be re-evaluated in two years to determine if:

- (1) The completion rate has improved
- (2) Recommendations were successfully implemented/quality of training has improved
- (3) Any further changes need to be implemented



## Appendix A: Interactive Elements for Live Training

Adult learning theory's emphasis on relevance, connection to past experience, sustaining internal motivation, and egalitarianism leads one to conclude that engaging activities are more necessary than in a traditional classroom. Public officials tend to be participatory learners who appreciate experiential learning where they can connect concepts and materials to their existing knowledge and experience base. Among the specific tools instructors should be encouraged to use when engaging municipal officials are:

- Establish class objectives at the beginning of the class,
- Make use of roundtables and small group activities to encourage collaboration and shared learning,
- Focus on the actual experiences and issues facing learners and their communities, and where possible, create a blended learning experience that incorporates both visual (PowerPoint/videos) and auditory (lecture/group discussion) approaches.

The following list of interactive elements emerged from the literature on adult education:

### 1. *Think-pair-share or think -write-pair-share*

The process is very simple. The teacher puts forward a question without a right or wrong answer and gives the class time to think of an answer or possible implications. After a few minutes, each student turns to a pair and shares their response. The pairs discuss the question for a few minutes until the teacher throws open the floor to responses for the whole class. One alternative is to allow students time to write their responses before sharing and then having them compare and contrast the written response with their partner.

TPS, a strategy originally developed for college classrooms, is designed to allow the largest number of students to discuss lecture or reading material at once. The entire class is engaged, with half directly contributing their thoughts and the other listening/digesting. It can foster greater participation than simply throwing open the floor to discussion because the personal interaction motivates students. Shy students have the ability to develop and rehearse their thoughts before sharing with a wider audience. Depending on the size of the group, the teacher can also move among the different groups, offering his or her opinion as well as gauging the general understanding on the concept among the class.

### 2. *Tell-help-check*

THC is very similar to TPS, allowing adult students the ability to formulate an understanding and share that understanding with a peer. Again the class is divided into pairs. The teacher poses a question based on information covered in the lecture and one of the partners develops a response. After a few minutes, the response is given to the other partner who revises and adds additional information. After both partners have been able to provide input on the response, the response can be checked to determine its accuracy.

The main difference between TPS and THC is that TPS is for open-ended discussion based questions whereas THC is for questions that have "true" answers. THC allows students to demonstrate understanding of an issue that they have just learned in class. The collaborative

element is designed to increase student interest in the activity. Also, the teacher can move about the groups, gauging understanding and offering insight.

3. *Problem Based Learning(Case Study)*

PBL is usually applied to an entire approach to learning in the classroom, but can also function as a tool in any classroom. Essentially, students learn content by applying outside knowledge and recently acquired knowledge to solve some problem. Students are presented with a loosely structured “real world” problem. The problem should be familiar to the students but complex enough that it cannot be solved using only prior knowledge. Working in groups, students then use experiential knowledge and newly introduced information (possibly from the lecture) to outline a solution to the problem.

Typically, PBL would then have students seek out additional information to fully answer/solve the question presented to them. This research step is designed to emphasize the importance of engaging with outside materials to provide sufficient perspective on a problem, but is impractical in the training situation. One possible modification would be to provide supplemental materials that aren’t directly utilized in the lecture but have relevant information. These materials could also be made available through the website to familiarize commissioners to resources available to them.

4. *Skit/Scenario*

Some topics that commissioners may need to learn or may want to learn are best demonstrated through ‘real world’ reinforcement. Ambiguous topics, such as ethics, or problems without a clearly operationalizable solution, such as running meetings/handling unruly citizens, are best dealt with in a space lacking clear rules and boundaries.

Skits would use volunteers, most likely students from planning programs, to present content. This format is fairly straight forward. Three to five students would perform (either scripted or improvised with the direction set beforehand) for five to ten minutes.

5. *Role-Playing/Scenario*

This would be similar to the skits except audience members are used instead of outside actors. A context (scene) would be established and different members would be assigned roles (or they could volunteer for a role) and given a motivation or desired outcome. Everyone would then be placed within the scenario (commission meeting, meeting with developer, etc.) and instructed to act it out.

Skits and scenarios give participants more flexibility to diverge from structured content and therefore flush out questions that may not arise within a formal setting. Both forms present a ‘dramatized’ version of a planning issue with the difference resting on whether participants or volunteers act out the issue toward a resolution.

Both formats would be followed up by a discussion lead by the facilitator. The topics for discussion could be: how would you respond in the situation, what should people have done, what other questions does it raise, are there any other ways to handle the situations, etc.

## 6. *Educational Games*

Educational games allow people to interact directly with issues in a structured setting. Ideal games would have a diverse range of actors (players), who are given specific goals, and allow players to achieve those goals within the confines of the game. It is similar to the scenario set up, but it's more structured in its presentation. Scenarios leave the entire realm of possible choices open, whereas a game restricts choices to those allowed in the game.

Engaging, relevant games that are not beneath participants are difficult to find. However, one possible game is the Watershed Game, which was developed to teach elected officials about the relationship between land use, water quality, and development. The Watershed Game is produced by NEMO, Nonpoint Education for Municipal Officials. According to the website, "participants learn how a variety of land uses impact water and natural resources, increase their knowledge of best management practices (BMPs), and learn how their choices can prevent adverse impacts."<sup>8</sup>

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<sup>8</sup> Website: <http://www.northlandnemo.org/watershedgame.html>

## Appendix B – MPCA Survey Analysis

The Maryland Planning Commissioners Association reached out to 1449 people identified as serving on a planning commission, board of zoning appeals, planning advisory board, or similar body to receive feedback on citizen planner training in the State of Maryland. Respondents can be divided into two groups: those filling out online surveys and those filling out paper surveys. The two different methods were used because of the differences in the type of contact information provided to MPCA by its members. However, the wording of survey questions, in all feasible occurrences, was maintained between both methods.

### Survey Results and Findings (Summary)

#### Completion rates

- 86% of respondents report completing a planning and zoning course
- 68% completed online course vs. 16% completed local course
- A higher percentage of people reported completing local training than is recorded in the database

#### Course Content – Top Five

- Variances and Special Exceptions (Score: 264)
- Comprehensive Plans (Score: 235)
- Planning Law (Score: 201)
- Zoning Code (Score: 186)
- Non-Conforming Uses (Score: 146)

#### Delivery Methods

- Strong support for self-study materials (printed, online, webinar)
- High comfort level with and support for internet training
- Desire for more interactive elements in live trainings

#### Other

- Support for quarterly newsletter and education materials for local jurisdiction

### Outreach

Six hundred eighty-one individuals (681) in the MPCA database had a ‘unique’ email address and two hundred sixty four (264) shared or had a ‘duplicate’ an email address with at least one other individual in the database. These two groups completed the same survey, but were contacted in slightly different methods relevant to the contact information provided. Four hundred eighty seven (487) people without any email address provided were contacted through a mailed survey. Seventeen had no contact information provided. They could not be reached.

	Returned	Response Rate
Online-Unique	144	21.1%
Online-Duplicate	17	6.4%
Paper	108	22.2%
<b>Total</b>	<b>269</b>	<b>18.8%</b>

Table B.1: Response Rate

Two hundred sixty-two (258) people responded in some form. The overall response rate was 19%. The response rate was similar for both online and paper based respondents. It should also be noted here that both the paper and online mailing received a number of “bounce backs” indicating that there are problems with the database.

### Respondent Information

**Table B.2: Are you currently a member of...?**

	Survey			MPCA Members
	All	Online	Paper	
Board of Appeals	36%	17%	67%	40%
Planning Commission	57%	74%	30%	58%
Other	7%	9%	3%	2%

Overall, survey respondents were similar to MPCA Members in terms of the organizational bodies that belonged to. Unfortunately, space constraints prevented more demographic information being collected for paper respondents. However, online respondents provided a large snapshot of demographic information. For the online additional online information, see appendix.

#### *Online respondents vs. MPCA members*

Planning commissioners were overly represented in the survey compared to MPCA member information (70% of respondents vs. 58% of members). The survey was slightly biased in favor of county level planning and zoning participants (26% of respondents vs. 20% of members). About a quarter of respondents have served more than 10 years and almost 50% have served at least 5 years. The average age of participants was 60 and the median was 60.

## Completion Rate

**Table B.3: Have you completed the Planning Commissioner Training Course?**

	MPCA Members	Survey Results					
		All Survey	Online Survey	Paper Survey	Board of Appeals	Planning Commission	Other
		N=1447	N=244	N=153	N=100	N=89	N=141
No	37%	14%	8%	19%	12%	11%	43%
Yes	63%	86%	92%	81%	88%	89%	57%

**Table B.4: Which Course Did you Complete?**

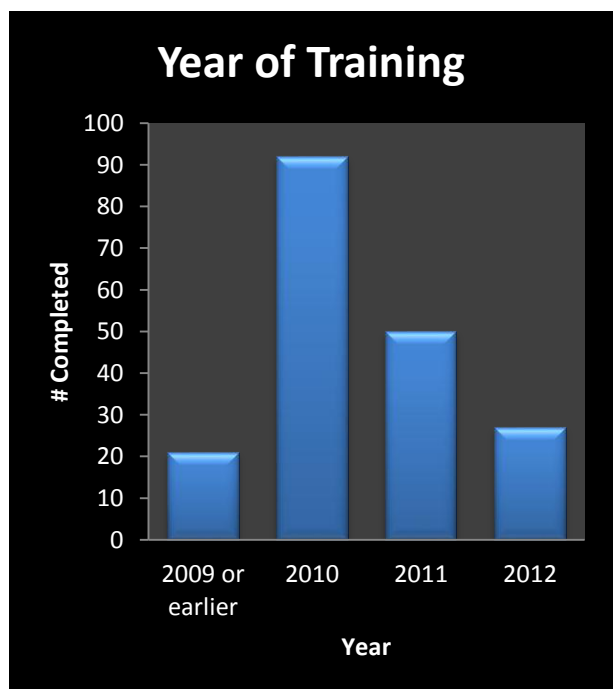
	MPCA Members	Survey Results					
		All Survey	Online Survey	Paper Survey	Board of Appeals	Planning Commission	Other
		N=907	N=216	N=139	N=77	N=74	N=123
Locally Provided	7%	16%	13%	28%	16%	14%	25%
MDP Online Course	80%	68%	68%	69%	70%	69%	38%
MDP Live	13%	16%	19%	14%	14%	17%	38%

Both paper based and online respondents were more likely to have completed a training course than the average MPCA member (86% vs 63%) Of those respondents who completed a training course, survey participants were more likely than MPCA members to have completed a local training course (16% vs. 7%). MPCA members were more likely to have done the course online (80% vs 68%).

Paper based respondents reported the highest levels of local course completion. They were twice as likely as online respondents and four times as likely as MPCA members in general to have completed a local training course.

The differences in completion rates, it should be noted, may be more attributable to difficulties in receiving confirmation that MPCA members completed a local course than actual differences in completion rates.

Most people who completed training did so in 2010, immediate after the law came into effect. This reflects a similar trend recorded for those who completed the training online. There was a 45.6% drop in the number of people completing the course between 2010 and 2011 and a 46.0% drop between 2011 and 2012.



*Course Content*

Survey participants were asked to pick and rank the top three educational topics they would like to see covered in a training course. The choices were generated by Maryland Department of Planning staff. A voting vector system was used to derive a score for each choice. A first place vote carried a weight of three, a second place vote carried a weight of two, and a third place vote carried a weight of one. The score was derived by multiplying the number of votes a given option received at a given level by that level’s weight and adding together each level. The results are displayed in Table 5.

Table B.5: Course Subjects Full Results

	First Choice		Second Choice		Third Choice		Score
	#	%	#	%	#	%	
Capital Improvement Planning	15	6%	11	5%	15	7%	82
<b>Comprehensive Plans</b>	<b>49</b>	<b>21%</b>	<b>30</b>	<b>14%</b>	<b>28</b>	<b>13%</b>	<b>235</b>
Development Process	12	5%	20	9%	20	9%	96
Meeting / Public Participation	9	4%	23	10%	19	9%	92
Non-Conforming Uses	17	7%	31	14%	33	15%	146
<b>Planning Law</b>	<b>40</b>	<b>17%</b>	<b>24</b>	<b>11%</b>	<b>33</b>	<b>15%</b>	<b>201</b>
Subdivision Regulation	4	2%	13	6%	16	7%	54
<b>Variances and Special Exceptions</b>	<b>58</b>	<b>25%</b>	<b>30</b>	<b>14%</b>	<b>30</b>	<b>14%</b>	<b>264</b>
Zoning Code	27	12%	40	18%	25	11%	186
Other	1	0%	0	0%	0	0%	3
Total	232		222		219		

The results were fairly consistent between the two survey methods. Both comprehensive plans and zoning code were ranked in the top three for paper and online participants. The biggest difference was difference in the relative ranking of planning law. Online participants ranked it their top choice while paper based participants placed it sixth.

A more interesting difference emerged between board of zoning appeal members and planning commissioners. Planning commissioners and board of zoning appeals members differ in their top two choices, but agree for their third choice. Planning law, which is the top choice among planning commissioners, places sixth among board of zoning appeals members. Conversely, non – conforming uses was ranking higher by board of zoning appeals members than by planning commissioners (7<sup>th</sup>)

Board of Appeals		Planning Commission	
Subject	Score	Subject	Score
Variance and Special Exception	177	Planning Law	159
Non-Conforming Uses	81	Comprehensive Plans	156
Zoning Code	59	Zoning Code	115

Table B.6: Top Three Subjects by Organization

Some of the differences between paper and online results can be attributed to the over representation of board of appeals members among paper survey respondents and planning

commissioners among online survey respondents. It is therefore possible that differences between the survey form (paper or online) are not attributable to the collection method and instead reflect the differences in respondent’s organization.

*Delivery Methods*

Survey participants were asked to rank different delivery methods for course material/training platforms. This question also asked respondents to pick and rank their top three among a provided list and the same voting vector was also used to score each option

Table B.7: Delivery Methods Full Results

	First Choice		Second Choice		Third Choice		Score
	#	%	#	%	#	%	
Interactive Classroom	44	26%	17	10%	26	17%	192
Online Materials	54	32%	52	32%	21	14%	287
Printed Materials	26	15%	39	24%	43	28%	199
Traditional Classroom Setting	22	13%	21	13%	24	16%	132
Webinar	25	15%	32	20%	34	23%	173
Other	0	0%	1	1%	3	2%	5
Total	171		162		151		

Interactive classrooms were distinguished in the survey from traditional classrooms by the inclusion of active elements into the presentation. The active elements included discussions, case studies, games, role-playing and scenarios.

Online participants were asked specifically about the inclusion of active elements. Forty-six percent favored some slight modifications such as more discussion time but not activities such as role playing or games. Twenty-nine percent favored any active element that broke up the monotony of lecture-based presentation.

Board of Appeals		Planning Commission	
	Score		Score
Online Materials	127	Online Materials	132
Interactive Classroom	92	Printed Materials	96
Printed Materials	91	Interactive Classroom	84

Table B.8: Top Three Delivery Methods by Organization

Across all collected variables, ‘online materials’ was ranked as the most desirable delivery method. Paper survey participants in general ranked the classroom option higher than online respondents, who placed them last and second to last. Boards of appeals members were slightly more favorably disposed than planning commissioners towards interactive classrooms. Overall though, the discernible groups ranked the different delivery methods in a relatively consistent order: Online materials as the most favored, interactive classrooms and printed materials in the middle, followed by webinars. While some individuals ranked traditional classrooms as the preferred choice, almost every group ranked it last.



*MPCA Services*

Survey participants were asked to rate their desire to receive different MPCA services. The rating scale used is one to three with ‘Not Interested’ valued at one and ‘Very Interested’ valued at three. ‘Don’t Know’ doesn’t have a corresponding value and was not included in the average score calculation.

Table B.9: MPCA Services Full Results

	Don't Know		Not Interested		Somewhat Interested		Very Interested		Average Score
	#	%	#	%	#	%	#	%	
Reproducible brochure (materials for your jurisdiction)	6	3%	33	15%	87	48%	89	41%	2.27
Training in a Classroom Setting	8	4%	68	32%	91	63%	46	22%	1.89
Regional Conference	10	5%	70	33%	73	51%	61	29%	1.96
Quarterly Newsletter	4	2%	24	11%	92	48%	97	45%	2.34
Welcome Basket (orientation materials)	8	4%	64	31%	68	48%	66	32%	2.01
Annual Maryland Planning Commissioners Conference	11	5%	70	33%	77	55%	51	24%	1.90

Quarterly newsletter and reproducible brochure received the highest scores overall (2.34 and 2.27 respectively). This result reflects the general preference stated in the delivery methods section for printed and online materials.

Board of appeals members and planning commissioners had nearly identical ratings for reproducible brochures (2.30 vs. 2.28) and classroom training (1.94 vs. 1.88). The differences in ratings was slightly larger for quarterly newsletter (2.42 vs. 2.30) and welcome basket (2.07 vs. 1.99)

There was a significant difference in the ratings for regional conferences and annual conferences. Planning commissioners rated regional and annual conferences much higher (2.07 and 2.18 respectively) than board of appeals members (1.97 and 1.69 respectively).

	BOA Score	PC Score
Reproducible brochure	2.30	2.28
Classroom training	1.94	1.88
Regional Conference	2.18	1.67
Quarterly Newsletter	2.42	2.30
Welcome Basket	2.07	1.99
Annual Conference	2.07	1.69

Table B.10: MPCA Services by Organization

It is also interesting to note that overall classroom training, regional conferences, and annual conferences were rated similarly. However, splitting the data shows that planning commissioners favored the conferences over classroom training while board of appeals members favored classroom training over conferences. Classroom training’s rating stayed consistent, but the respective value attached to conferences diverged significantly

## Appendix C – Planning Director’s Survey

The survey of planning directors was carried out online over a three week period as part of the lead up to the Winter Planning Directors Roundtable. A discussion on training in Maryland was also held during the Winter Roundtable and responses informed this section. The online survey had a response rate of twenty-eight percent.

### Location of Survey Respondents

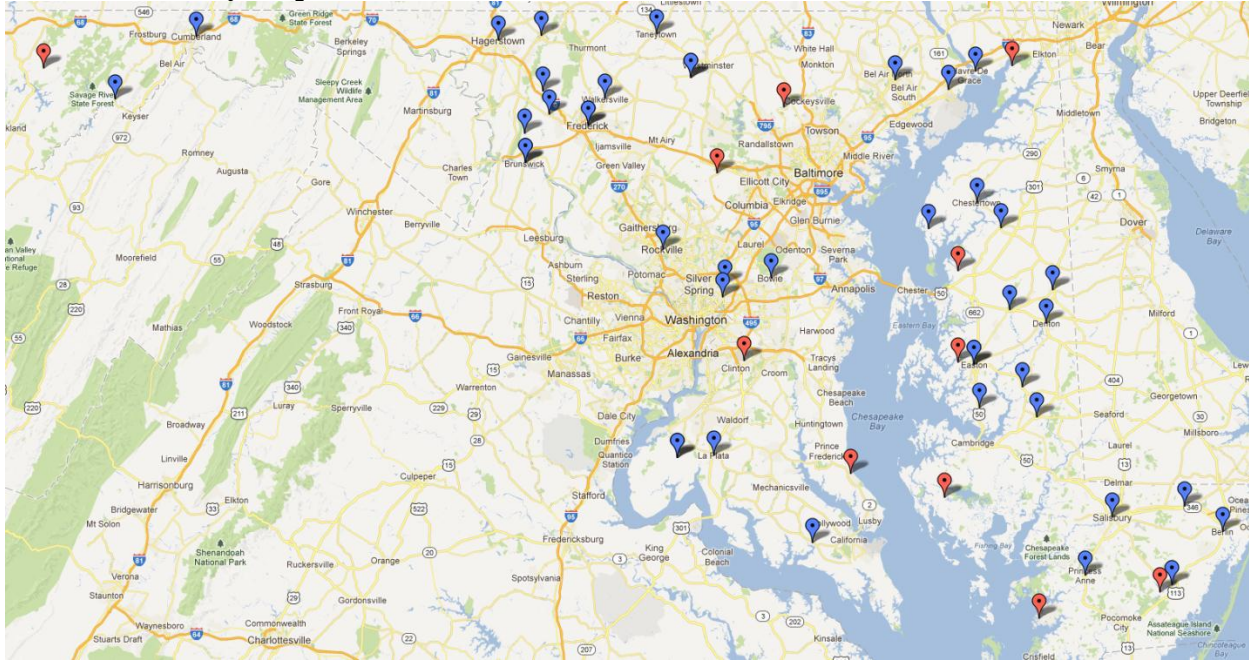


Table C.1: Respondent Location by region

Region	Represented in Survey		Provides Local Training	
	#	%	#	%
Baltimore Metro	7	14%	6	86%
Southern	5	10%	4	80%
Suburban Washington	11	22%	7	64%
Lower Eastern Shore	8	16%	4	50%
Upper Eastern Shore	15	29%	7	47%
Western	5	10%	3	60%
<b>Total</b>	<b>51</b>		<b>31</b>	<b>61%</b>

Survey respondents represent a good mix of local and rural jurisdictions across the state and large, heavily populated counties. The major absentee jurisdictions are municipalities in Montgomery Harford, and Anne Arundel County and Baltimore city. Regionally, the Eastern Shore was the best represented. Eleven county level planning directors responded to the survey with the rest coming from municipalities. Most of the municipalities were from Frederick county or the Eastern Shore. However, Howard and Baltimore County don’t have any incorporated municipalities, so there representation was fulfilled by the county level planning agency.

**Table C. 2: Does your jurisdiction provide local training?**

	#	%
Both Planning Commissioners and Board of Zoning Appeals Members	20	38%
Local training provided by another organization	2	4%
Only Planning Commissioners	4	8%
Other	2	4%
Previously provided training	3	6%
We do not provide local training	21	40%
<b>Total</b>	<b>52</b>	

**Table C. 3: Do you direct members to complete the MDP Training?**

	#	%
Online Training	16	34%
Training at Conferences	2	4%
Both	24	51%
Neither	5	11%
<b>Total</b>	<b>47</b>	

**Table C.4: How is local training delivered?**

	#	%
Online Materials	11	38%
Printed Materials	17	59%
Lecture	2	7%
Video or other Multimedia	3	10%
Group Discussion	13	45%
One-on-one or Small Group	8	28%
Other	3	10%

\* 29 Responses to this Question. Respondents could select more than one choice

One-on-one or small group was distinguished from group discussion by the different roles of the instructor. Instructors in discussions act as facilitators whereas small group implies a style closer to a traditional classroom format. Most planning directors did not favor lecture style presentations.

Printed materials and group discussion were reported as the most common forms of local training (59% and 38% respectively). Participants of the roundtable also identified a desire for content platforms that could be used by planning directors during local training. One participant observed that creating flexible material empowered planners to use materials at their leisure and when needed, for both appointed citizen planners and elected officials who affect the process.

**Table C.5: Which of the following topics are most important for a Planning Commissioner to learn during training?**

Topics	First Choice		Second Choice		Third Choice		Weighted Score
	#	%	#	%	#	%	
Capital Improvement Planning	2	4%	6	13%	7	16%	25
<b>Comprehensive Plans</b>	<b>11</b>	<b>23%</b>	<b>4</b>	<b>9%</b>	<b>3</b>	<b>7%</b>	<b>44</b>
<b>Development Process</b>	<b>5</b>	<b>11%</b>	<b>13</b>	<b>28%</b>	<b>1</b>	<b>2%</b>	<b>42</b>
How to run a meeting/engage the public	8	17%	2	4%	6	13%	34
Other	1	2%	1	2%	1	2%	6
Subdivision Regulation	1	2%	2	4%	8	18%	15
<b>Variances and Special Exceptions</b>	<b>9</b>	<b>19%</b>	<b>8</b>	<b>17%</b>	<b>9</b>	<b>20%</b>	<b>52</b>
<b>Zoning Code</b>	<b>10</b>	<b>21%</b>	<b>10</b>	<b>22%</b>	<b>10</b>	<b>22%</b>	<b>60</b>
Total	47		46		45		

The top course topics identified by planning directors are similar to those identified by planning commissioners. Zoning code, comprehensive plans and variances and special exceptions were selected by little more than twenty percent of respondents as the top choice. Public engagement, as with planning commissioners, was generally seen as secondary to planning implementation tools. However, interacting with frustrated or angry citizens was generally agreed upon to be a challenge and that commissioners would benefit from training in how to defuse such situations.

During the roundtable discussion, there was a general interest in some form of continuing education, focusing on advanced topics. Some subjects suggested included green development, smart growth, geographic information systems, complete streets, and sustainability.

**Table C.6: When do you provide training?**

	#	%
Ad hoc for new members	17	65%
Ad hoc upon request or perceived need	11	42%
Periodically for new members and old members	4	15%

\* 26 Responses to this questions. Respondents could select more than one choice

**Table C.7: How do you determine topics that need to be covered? - Open-Ended Question**

Themes	#	%
Cover Foundation / Basic Planning Knowledge	8	31%
Response to Local / County Issues	7	27%
Cases Before the Board	7	27%
Response to Legislative / State Issues	7	27%
Individual Request	6	23%
Planning Director or Outside Expert Advice	5	19%
Based off State Training Materials	5	19%

\* 26 Responses to this Questions

## Conclusions

### 1. Prevalence of Local Training

The majority of surveyed planning directors offered some form of training and many interactions between planning directors and commissioners can be seen as a form of education. While some local staff develops educational content that can be used in many situations, local directors offer a lot of informal guidance on the planning process. Local training can have an ambiguous, effervescent quality that should not be dismissed because it does not happen in a structured classroom.

Planning directors are constantly informing commissioners of the ramifications of local issues. A lot of state training discussing planning concepts in more abstract terms, but commissioner decisions have impacts that can be difficult to foresee, especially for a new commissioner. One of the best ways to assist them may be to increase the resources available to them to supplement their ad hoc education.

### 2. Local Responsiveness

Local training is often a reactive response to a particular issue facing a community at a particular point in time. Local staff is much better suited than state trainers to understanding the individualized needs of planning commissioners. The main purpose of planning commissioner training is to equip the commissioner with the necessary tools to judge developmental decisions in their jurisdiction.

### 3. Leveraging local resources

During the round table, some commissioners also identified learning from the decisions of other jurisdictions. While Maryland is not a homogenous planning environment, neighboring communities often face similar development pressures and issues. The institutional knowledge of a particular jurisdiction can be very beneficial in informing the process of another jurisdiction. MPCA could act as an informal planning network facilitator, allowing jurisdictions to share accumulated knowledge by connecting commissioners in different jurisdictions.

## Appendix D – Completion Rate Tables

Table D.1: Differences between County Level Planning Commissions and Boards of Zoning Appeal by Region

Region	Planning Commission			Board of Zoning Appeals		
	% MDP	% Local	Overall	% MDP	% Local	Overall
Western	62%	0%	62%	58%	0%	58%
Baltimore	50%	8%	58%	64%	0%	64%
Southern	86%	0%	86%	67%	0%	67%
Upper Eastern Shore	27%	17%	44%	48%	34%	83%
Lower Eastern Shore	72%	0%	66%	48%	0%	48%
Suburban Washington	79%	0%	79%	47%	0%	47%
<b>Total</b>	<b>57%</b>	<b>6%</b>	<b>62%</b>	<b>55%</b>	<b>7%</b>	<b>63%</b>

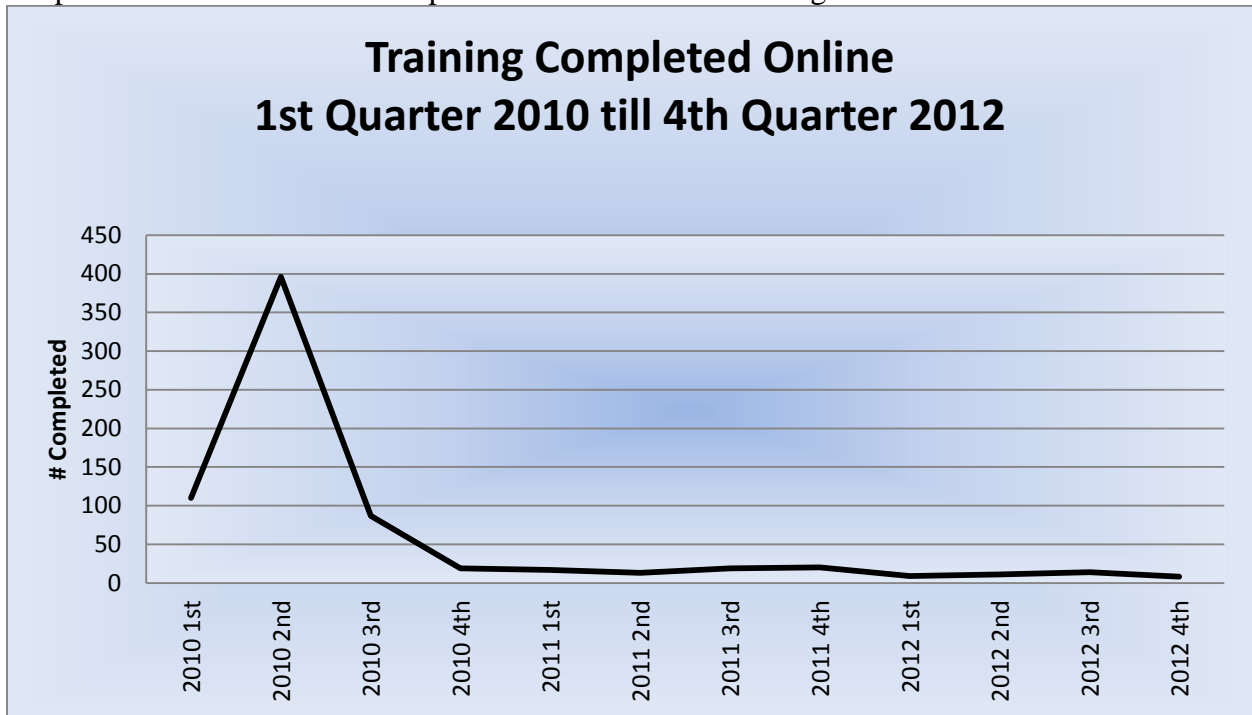
Table D.2: Differences between Municipal Level Planning Commissions and Boards of Zoning Appeal by Region

Region	Planning Commission			Board of Zoning Appeals		
	% MDP	% Local	Overall	% MDP	% Local	Overall
Western	48%	4%	53%	61%	0%	61%
Baltimore	72%	0%	72%	58%	0%	58%
Southern	79%	0%	79%	69%	0%	69%
Upper Eastern Shore	54%	12%	66%	57%	5%	62%
Lower Eastern Shore	65%	3%	68%	60%	2%	62%
Suburban Washington	57%	4%	61%	62%	3%	65%
<b>Total</b>	<b>59%</b>	<b>5%</b>	<b>64%</b>	<b>60%</b>	<b>2%</b>	<b>62%</b>

Table D.3: Differences between Counties and Municipalities by Region

Region	County Level				Municipal Level			
	# of Obs.	% MDP	% Local	Percent	# of Obs.	% MDP	% Local	Percent
Western	46	65%	11%	76%	193	51%	0%	51%
Baltimore	84	54%	5%	58%	151	67%	0%	67%
Southern	40	75%	0%	75%	55	75%	0%	75%
Upper Eastern Shore	68	37%	25%	62%	291	55%	9%	64%
Lower Eastern Shore	58	60%	7%	67%	195	61%	1%	62%
Suburban Washington	34	65%	0%	65%	232	59%	3%	62%
<b>Total</b>	<b>330</b>	<b>57%</b>	<b>9%</b>	<b>66%</b>	<b>1117</b>	<b>59%</b>	<b>3%</b>	<b>62%</b>

Graph D.1: Individuals who completed the MDP online training



### Appendix E: Overview of Planning Commissioner Training in Other States

State	Initial	Continuing Education	Subject Areas	Enforcement
Tennessee	4 hours	4 hours annually	Detailed. See States individual description	Board members must file a certificate with the secretary of their local board with the date of each training program attended, its subject matter, location, sponsors, and time spent
New York	4 hours	4 hours annually	Local jurisdictions are free to determine format, content, and certification.	Non certified members cannot be reappointed. Board members can also be removed for non-compliance if the local law authorizes the mayor to do so.
New Jersey	5 hours	None	Board roles and responsibilities, the master plan, and the process of reviewing development applications	New members must agree to attend training within 18 months or won't be seated. Members who fail to complete aren't eligible for further service.
Kentucky	4 hours	8 hours every two years	Detailed. See States individual description	Appointed board or commission members who fail to complete the required training are subject to removal.
Louisiana	4 hours	None	Duties, responsibilities, ethics, and substance of the positions held or to be held	No apparent enforcement mechanisms
South Carolina	6 hours	3 hours annually	Detailed. See States individual description	Each official must file certification form and documentation with municipal clerk each year.
New Hampshire	6 hours			Training not required, just strongly encouraged.



## South Carolina

### *Law*

South Carolina requires 6 hours initially within a year of appointment and 3 hours annually after that. This requirement also applies to planning staff unless they hold AICP certification, have a Master's or PhD in Planning or have a law degree. The required subject areas are very similar to Tennessee and Kentucky, implying the law was either written with input from similar people or was modeled on an existing law. They include: (1) land use planning;(2) zoning; (3) floodplains; (4) transportation; (5) community facilities; (6) ethics; (7) public utilities; (8) wireless telecommunications facilities; (9) parliamentary procedure; (10) public hearing procedure; (11) administrative law; (12) economic development; (13) housing; (14) public buildings; (15) building construction; (16) land subdivision; and (17) powers and duties of the planning commission, board of zoning appeals, or board of architectural review. These topics are divided between orientation training and continuing education, with the law stating that they should include, but not be limited to those 17 topics.

The law created the South Carolina Planning Education Advisory Committee (SCPEAC), a five member board tasked with developing education standards, determining approved course providers, and providing annual reports on the determinations concerning approved education programs and categories of exemption. While they are tasked with annual reports, only one report, from 2010, is available online. The body is not provided a budget and has no staff to support the five members.

### *Course Providers/Implementation*

SCPEAC has certified only two organizations to provide orientation training: South Carolina Association of Counties (SCAC) or the Municipal Association of South Carolina (MASC). To cut down on costs, orientation training is posted online and can be requested on DVD. SCAC has divided the content into two 3 hour videos while MASC has divided it into six one hour videos. Both require, as per the law concerning online training, that a facilitator be present to guide the discussion. MASC requires an 'approved facilitator' typically from MASC, SC APA, or SC Association of Regional Councils.

SCAC doesn't have approved facilitators, only requiring that they have AICP, Master's or PhD in Planning, Master's in Public Administration or a license to practice law in South Carolina. Conceivably, the local planning director would be able to fulfill the role of facilitator with SCAC presentation materials. This is done to make training as many people as easily as possible. Steve Riley, Chairman of SCPEAC, points out that there are over 46 counties and 269 municipalities with many that have small populations. This means little budget for travel to conferences or live presentations at the local jurisdiction. The ease of training has allowed a very high completion rate. SCPEAC estimates 95% to 100% of people required to take the orientation training did so within 2 years of the laws implementation in 2003.<sup>9</sup>

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<sup>9</sup> Without staff and without enforcement on the state level, this is only an estimate. However, SCAC and MASC both agree that initially after the law past, completion was in the high 90%.

Continuing education is not as structured as orientation training. Approved providers still tend to be nonprofit groups (APA, MASC, AIA, etc.) or the universities (Clemson, Georgia Tech). Topics and format are also left up to the providers with only two stipulations. Content must be consistent with the 17 topics laid out in the law and facilitators must have a knowledge of the subject and a knowledge of the jurisdiction. Certifications of attendance must be submitted to ensure compliance with continuing education requirements.

## Tennessee

### *Law*

Planning Commissioners in Tennessee must complete 4 hours of initial training within one year of appointment and 4 hours each year after that. The required areas include 17 different topics. They include: (1) land use planning; (2) zoning; (3) floodplains management; (4) transportation; (5) community facilities; (6) ethics; (7) public utilities; (8) wireless telecommunications facilities; (9) parliamentary procedure; (10) public hearing procedure; (11) land use law; (12) economic development; (13) housing; (14) public buildings; (15) natural resources and agricultural land conservation; (16) land subdivision; and (17) powers and duties of the planning commission. Tennessee's law also requires that planning and zoning officials must meet the same minimum number of hours, but allows an exemption for AICP. Tennessee's law contains an opt-out provision for local governments. The legislative body can pass an ordinance or resolution stating training is not in the interest of the county or municipality.

### *Implementation*

Local and regional planning commissions are responsible for maintaining records and certifying acceptable course content and providers. They must also pay for training expenses, including travel, of individual members. There is no statewide oversight body nor are there any statewide approved providers. Conceivably Tennessee APA conferences qualify, but that is a jurisdiction by jurisdiction decision. There is also no online content.

## New York

### *Law*

Members of Planning Boards in New York must complete 4 hours of training annually. New York's law places a lot of the controls over the details in the hands of local jurisdictions. An opt-out provision exists, similar to Tennessee's, which allows local jurisdictions to obtain a waiver if it's in the best interest of the jurisdiction. Local legislatures are free to determine format and content, although the State's Local Government Services Office provides most of the training. Local legislatures are also free to determine the process of certification and who maintains records.

Board members who fail to complete the required hours cannot be reappointed. Furthermore, board members can be removed for noncompliance if the local legislature empowers the mayor to do so. Finally, board decisions cannot be overturned, voided, or declared invalid because a

member has failed to complete training. The implementation of New York's law doesn't expressly separate orientation training from continuing education. Members, as a matter of practice, are expected to take courses that are relevant to them. The two main providers of training in the state are the New York Planning Federation and New York Department of State's Local Government Services.

### *Course Providers/Implementation*

New York's Local Government Services offers a number of introductory courses designed for new members and more advanced courses on planning tools. Introductory courses cover the basics of planning and zoning. Among those basic courses are topics such as Planning and Zoning: An Introduction, Planning Board Overview, Zoning Board of Appeals Overview, and Public Meetings and Hearings. More advanced topics delve into planning tools and concepts. Courses range from specific, process based classes (i.e. Site Plan Review) to classes focusing on legal topics (i.e. Freedom of Information Law/Open Meetings Law) to theory based classes (i.e. Smart Growth or Transit Oriented Development). Classes are 1 hour, 1.5 hours, or 2 hours in length, depending on the complexity of the topic and amount of information to cover.

The four basic courses mentioned previously are all available online through interactive training modules. The modules go about simple video and/or PowerPoint presentation, requiring the viewer to answer questions to progress through the material. Live presentations are done by Department of State planners and attorneys at conferences and workshops around the state. By request, DOS will provide trainings at regional or county planning agencies. Municipalities can also request live trainings, but typically DOS will require several municipalities to be present. In most cases, DOS provides trainings free of charge. When DOS does charge, it is typically for travel related expenses and when single municipalities want private training. Host agencies will occasionally charge a nominal fee if food is provided. DOS estimates that it provides 60% to 70% of courses taken statewide.

### New Jersey

#### *Law*

A law passed on July 7 2005 in New Jersey requires that members of planning, zoning, and consolidated land use boards must complete 5 hours of training within 18 months of appointment. Areas of study include roles and responsibilities of planning and zoning board members, the purpose and use of the master plan (including the relationship of elements to other local, regional and state planning documents) and the local development application review process. The law also requires that each participant complete a standardized test at the end of the course, but there is no mention of pass/fail grades or if failing disqualifies board member. Members who refuse or fail to complete 5 hours of training may be removed from the board to which they were appointed.

There are a number of important exceptions and caveats. First, members who hold AICP certification or completed course work more extensive than the law requires are exempt. Second, while the law requires the completion of a test, the test is to be open note and open book. Third,

removal is up to the local governing body and not enforced at the state level. The law as originally written automatically removed noncompliant board members. It was determined to be unenforceable and usurping the power of local governing bodies. The law was therefore amended to empower and require local governing bodies to remove noncompliant members.

### *Course Providers/Implementation*

The program is administered through the Department of Community Affairs, Local Government Services Division. They provide some staff support and approve course providers. The Department of Community Affairs also maintains lists of current board members, completion information, and contact information. The law requires that designated municipal clerks submit the information in a timely manner and report any changes.

New Jersey also has the New Jersey Planning Officials association (NJPO) a state wide non profit association for planning officials. It created the Association of New Jersey Planning Boards and Zoning Boards of Adjustments (NJAPZA) to provide education courses for its members. While independent of any state agency, by law, the NJPO works closely with the DCA to provide course content.

Courses are provided by organizations “with a proven track record of providing high quality courses in land use law and planning.” Providers include mostly independent lawyers, professional associations such as the New Jersey Planning Officials association, and educational institutions. These organizations perform live training across the state at a cost between \$50 and \$200 per participant. Municipalities are required to pay for the courses but may defray costs of tuition through development application fees.

The main training providers are the NJPO, Rutgers’s Center for Government Services, and the Association of Planning and Zoning Administrators (NJAPZA). These three organizations work together to provide training across the state at frequent intervals. Rutgers typically is the host of regional conferences with NJPZA or NJPO providing instructors. NJPZA and NJPO also hosts webinars on planning topics but these online courses don’t fulfill the law’s requirement as these courses are a part of a continuing education program not mandated by law. It appears that planners must attend a live training to qualify.

## Louisiana

### *Law*

Louisiana’s training law, passed in July 2004, requires four hours of orientation training that covers duties, roles and responsibilities, and ethics. This training must occur within one year of taking office. There are no apparent enforcement mechanisms and no oversight body. Local officials are allowed to determine content and structure of courses, but the Louisiana APA provides most training. Local officials are also supposed to keep records of people who have completed the training requirement, but aren’t required to inform the state.

### *Implementation*

There is no online content and no online courses satisfy the training requirement. According to the LA APA, people are allowed to receive training from other bodies, but there appears to be no state mechanism for approving course providers. LA APA estimates that most planners have gone through one of their trainings, but absent detailed records, are unable to provide completion rates. They hold four to five regional workshops per year and an annual conference where citizen planners can receive training.

## Kentucky

### *Law*

Kentucky law requires four hours of orientation training within one year and eight hours of continuing education training every two years. The training is required by planning commissioners, board of adjustment members, and planning professionals. The requirement for planning professionals is double (8 hours of orientation and 16 hours every two years). The course content may cover land use planning; zoning; floodplains; transportation; community facilities; ethics; public utilities; wireless telecommunications facilities; parliamentary procedure; public hearing procedure; administrative law; economic development; housing; public buildings; building construction; land subdivision; and powers and duties of the board of adjustment. Planning commissions must keep records of documentation but there doesn't appear to be a statewide body that maintains those records.

Planning commissioners that fail to meet the minimum training requirements are subject to removal. Professional planners who fail to meet the minimum training may not be employed. Kentucky APA also advises that noncompliance may jeopardize actions taken by a board but to date, no court has ruled on the issue. Kentucky is unique in that most states with training laws explicitly state that noncompliance of a member should have no effect on board decisions and such an aberration may reflect Kentucky's first in the nation status.

### *Implementation*

Local legislative bodies are responsible for the training, including approving providers, developing content, and administering the training. Kentucky APA provides resources, including funding to local jurisdictions to create training or attend workshops. Time spent watching training videos and reading educational materials counts towards a planner's hours, but must be documented.

Given the decentralized nature of planning commissioner training in Kentucky, information on completion rates and common course format are difficult to obtain. Kentucky APA appears to be the main statewide body for training, but it is not possible to verify. There does not appear to be any online content available specifically for Kentucky, but theoretically a local jurisdiction could certify an out of state training website as acceptable for training. Kentucky APA also maintains a library of training materials that can be used to fulfill training requirements.

## New Hampshire

### *Law*

New Hampshire's law does not require members of planning and zoning boards to complete a training course, but instead strongly encourages them to do so and provides a structure. It requires the Office of Energy and Planning to create a six hour orientation course. The platforms listed in the law include web-based, distance learning, traditional classroom, and self-study.

### *Implementation*

The Office of Planning and Budget provides training at conferences since 1995, but stopped in 2011 due to budget cuts. The conferences covered the basics (master plan, roles and responsibilities, zoning) and a number of revolving topics for advanced members. Before cuts, conferences were offered twice a year in different parts of the state.

The University of New Hampshire's Extension Services hosts online training through a citizen planner website. It has five training modules, covering planning and zoning, meeting and public participation, the master plan, site plan reading, and natural resources and land use planning. The modules mix short videos, power point style slides, "assignments," and reviews questions all with a voice over narrator. The assignments require the viewer to pause the video and complete some exercise which is then reviewed by the narrator.

## Appendix F: Examples of Online Training Modules

Screenshot from New York's Planning Board Overview Course showing some information presented by the module

The screenshot shows the 'Planning Board Overview - Online Course' interface. At the top, there are navigation links: CONTACT DOS | E-LEARNING TIPS | GLOSSARY | ATTACHMENTS | EXIT. The main content area is titled 'Planning Board Membership' and features a sidebar with a table of contents. The 'Eligibility' section is highlighted, showing the following information:

**Eligibility**

Planning Board Members are Public Officers

- Age 18 or older
- U.S. Citizen
- Resident of Municipality in which they serve

**Not Eligible**

- Member of Governing Board from same municipality

The sidebar table of contents includes:

Outline	Notes
1. Planning Board Overview	
2. Measuring Your Pre-Course Knowledge of	
3. Planning Board Membership	
4. Training Requirements	
5. Advisory Powers of the Planning Board	
6. Comprehensive Plans	
9. Regulatory Powers of the Planning Board	
13. Meetings and Hearings	
14. Meetings of the Planning Board	
17. Public Hearings of the Planning Board	
18. Making Legally Defensible Decisions	
19. County Planning Agency Referral	
22. State Environmental Quality Review (SEC	
24. Make Findings That Support Actions	
26. Taking Action on Applications	
28. File Decisions	
29. Challenging a Decision of the Planning B	
30. Measuring Your Post-Course Knowledge	
31. New York Department of State	
32. New York Department of State	

Screenshot of New York's Planning Board Overview module showing a pre-module question

The screenshot shows a pre-module question titled 'Measuring Your Pre-Course Knowledge of Planning Boards'. The question is 'Question 1 of 10'. The text of the question is: 'State law allows for municipalities to authorize the use of alternate members in the event:'. The question is followed by four radio button options:

- That a regular member is absent
- An alternate member is appointed upon application
- That a regular member is absent
- That the requirements are met

An 'Incorrect' feedback box is overlaid on the screen, stating: 'Incorrect. You'll learn about the use of alternate members in this course.' Below the feedback box is a 'Next Question' button. At the bottom right of the question area is a 'SUBMIT' button.

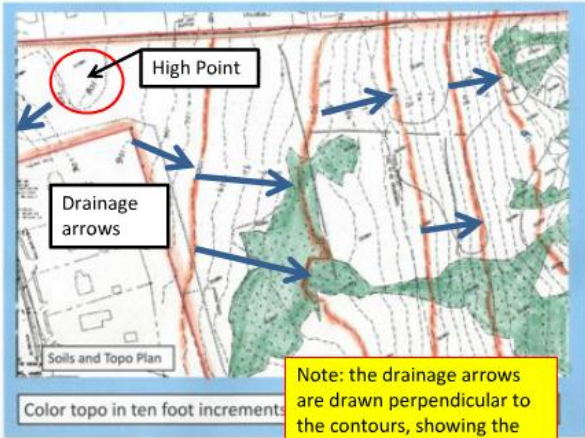
Screenshot from University of New Hampshire's Site Plan reading module showing the review slide for an assignment

[Return](#) [Site Plan Reading Training Module](#)

SITE PLANNING - PRACTICAL QUIZ

### Answer Sheet

- The high point is at elevation 108.
- Starting at elevation 100 and steadily heading down hill to 60 and lower, the topography drops down towards the northern portion of the property. (The north arrow can be found on the plan/profile sheet.)



### Plan Analysis

- The town's aquifer is directly north of the property. Knowing where the high point is and the direction of drainage flow, we now know that most of the site will drain towards the aquifer. This critical information gives the reviewer the "heads-up" to ensure that storm water quality and water quantity issues are securely addressed.
- Also, notice how the grade or topo lines are closer together as you proceed down hill. The closer the lines, the steeper the site. Combine steep slope with water and that reveals the site is likely to have ravines toward the north.

NEW HAMPSHIRE

Color topo in ten foot increments

Note: the drainage arrows are drawn perpendicular to the contours, showing the direction rainwater will flow.

Presenter

8 / 24

00:14 / 00:30

[Feedback](#)