

# PLAN CANADA

Institut canadien des urbanistes  
Canadian Institute of Planners

23:1 Jun 1983  
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views on  
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services**

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'Indoor City'**

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**TRADE - OFF - PUSLINCH**

LIBRARY	
LIBRARY	\$0
LIBRARY	\$7
LIBRARY	\$11

RECREATION	
RECREATION	\$3
RECREATION	\$6
RECREATION	\$10

GARBAGE DISPOSAL	
GARBAGE DISPOSAL	\$0
GARBAGE DISPOSAL	\$19
GARBAGE DISPOSAL	\$56

POLICE PROTECTION	
POLICE PROTECTION	\$0
POLICE PROTECTION	\$10
POLICE PROTECTION	\$44

FIRE PROTECTION	
FIRE PROTECTION	\$22
FIRE PROTECTION	\$29
FIRE PROTECTION	\$84

COUNTY ROAD MAINTENANCE AND SURFACE IMPROVEMENT	
COUNTY ROAD MAINTENANCE AND SURFACE IMPROVEMENT	\$10
COUNTY ROAD MAINTENANCE AND SURFACE IMPROVEMENT	\$13
COUNTY ROAD MAINTENANCE AND SURFACE IMPROVEMENT	\$43

TOWNSHIP ROAD MAINTENANCE AND SURFACE IMPROVEMENT	
TOWNSHIP ROAD MAINTENANCE AND SURFACE IMPROVEMENT	\$29
TOWNSHIP ROAD MAINTENANCE AND SURFACE IMPROVEMENT	\$76
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WINTER ROAD CLEARANCE : COUNTY AND TOWNSHIP	
WINTER ROAD CLEARANCE : COUNTY AND TOWNSHIP	\$16
WINTER ROAD CLEARANCE : COUNTY AND TOWNSHIP	\$22
WINTER ROAD CLEARANCE : COUNTY AND TOWNSHIP	\$27

ELEMENTARY EDUCATION : BUSSEING	
ELEMENTARY EDUCATION : BUSSEING	\$11
ELEMENTARY EDUCATION : BUSSEING	\$14
ELEMENTARY EDUCATION : BUSSEING	\$17

ELEMENTARY EDUCATION : FRENCH IMMERSION	
ELEMENTARY EDUCATION : FRENCH IMMERSION	\$0
ELEMENTARY EDUCATION : FRENCH IMMERSION	\$6
ELEMENTARY EDUCATION : FRENCH IMMERSION	\$24

ELEMENTARY EDUCATION : SPECIAL EDUCATION	
ELEMENTARY EDUCATION : SPECIAL EDUCATION	\$2
ELEMENTARY EDUCATION : SPECIAL EDUCATION	\$8
ELEMENTARY EDUCATION : SPECIAL EDUCATION	\$42

SECONDARY EDUCATION : BUSSEING	
SECONDARY EDUCATION : BUSSEING	\$7
SECONDARY EDUCATION : BUSSEING	\$10
SECONDARY EDUCATION : BUSSEING	\$13

SECONDARY EDUCATION : SPECIAL EDUCATION	
SECONDARY EDUCATION : SPECIAL EDUCATION	\$0
SECONDARY EDUCATION : SPECIAL EDUCATION	\$44
SECONDARY EDUCATION : SPECIAL EDUCATION	\$74



# Taxpayers' views on the provision of municipal services

Barry Smit and Alun E. Joseph

## ABSTRACT

Public officials may seek community input on the trade-offs between services that have to be made under a limited budget. A trade-off game may be used as an opinion survey tool to elicit taxpayer preferences about municipal budget allocations. Such a tool also serves a public education function. An experimental application of a trade-off game to the budget of a rural township is described.

A fundamental task of all levels of government is to provide services from tax revenues. A common dilemma confronting public officials is that taxpayers frequently demand improved services, yet are reluctant to pay increased taxes to finance such improvements.<sup>1</sup> It then falls upon politicians and administrators and, in some situations, planners to decide for the community which particular ser-

vices should be improved, which should be maintained at their current level and which should be allowed to deteriorate; rarely are citizens prepared to pay the taxes necessary to improve all public services.

This sort of problem regularly confronts Canadian municipalities, which are responsible for providing a host of public services, including education, road maintenance, fire protection, garbage collection and recreation. Funds to support these services, generated mainly via property taxes, are limited, and municipal officials seek to provide the best possible package of services, given this limited budget. During that examination, trade-offs must be made between one service and another and between different components of services.

Despite the trend for more and more public involvement in planning, especially at the municipal level, the public

generally has hardly any input into decisions on municipal service provision.<sup>2</sup> Typically decisionmakers have little information on residents' preferences for public services. It could be argued that, at the moment, information on residents' preferences would be of limited value anyway, because taxpayers have little knowledge of the costs of service provision, the alternative levels of services that are feasible, and the property tax implications of alternative levels of service provision. Yet, despite widespread concern, throughout Canada and elsewhere, with levels of property taxation and the quality of municipal services,<sup>3</sup> and a public demand for input into decisions on public expenditures, few effective mechanisms exist for the incorporation of informed public opinion into decisionmaking on the provision of municipal services.

This paper describes a tool, in game format, which has potential both for informing the public of costs of alternative levels of service and for identifying informed public preferences for services. It is intended primarily as a survey instrument to assist those responsible for planning the supply of services by providing reliable information on citizen perceptions of the service delivery system. The paper outlines the need for this type of instrument in the policy advisor's 'kit bag', explains the principles of the method, and demonstrates an exploratory application in a rural township in southern Ontario. The approach may be equally applicable to other types of municipalities.

## SERVICE PROVISION IN RURAL MUNICIPALITIES

Although all municipalities have the task of attempting to provide a suitable bundle of services with a limited budget, the problem has some distinctive features in rural areas. The dispersed nature of rural populations makes the provision of certain services very costly.<sup>4</sup> Rural residents tend to receive inferior levels of services and are further away from certain services than residents in urban areas. They experience, for example, unpaved roads, roads not quickly cleared of snow, infrequent garbage collection, and generally poorer access to schools, recreation facilities and police and fire protection.

Although there is little firm evidence, rural demands for services seems to have increased over the last decade. Some speculate that this is because the nonfarm portion of the rural population has continued to increase.<sup>5</sup> Perhaps it is also due to heightened expectations of established residents. Finally, it is also suggested that newcomers and established residents prefer quite different levels of services.<sup>6</sup>

Perhaps at this stage, we can only conclude that we don't know what levels of services rural residents do prefer, and would prefer if they were aware of the costs of providing alternative levels of services.

Thus, the service provision problem in rural

municipalities is a compound one of limited tax base, high costs to supply many services, changing demands for services, apparent differences in demands amongst residents, and an absence of reliable information on the preferences of residents for alternative levels of service provision.

Information on preferences or demands for services can be gathered in a number of ways. Some of these are briefly reviewed in the following section.

## PREFERENCES FOR SERVICES

Perhaps the most widely employed 'method' for ascertaining the views of taxpayers on the provision of services is to rely upon elected municipal representatives to reflect the preferences of their constituents. A strong case can be put that this is the responsibility of municipal councillors, and that those who do not adequately represent the preferences of the residents will be voted out of office. But it is also argued, sometimes by elected officials themselves, that a more comprehensive picture of the community's preferences for services would greatly assist in making decisions on services consistent with the views of residents.<sup>7</sup> Surveys are used increasingly at the municipal level to gauge public opinion,<sup>8</sup> asking residents to indicate their degree of satisfaction or dissatisfaction with existing services, or to identify those services in greatest need of improvement. Such surveys suffer from two related and important weaknesses. Firstly, residents may or may not

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### Résumé

## LES CONTRIBUABLES DONNENT LEUR AVIS SUR LES SERVICES PUBLICS MUNICIPAUX QUI LEUR SONT OFFERTS.

Les fonctionnaires publics peuvent trouver une ressource communautaire dans les échanges entre les services qui doivent dépendre d'un budget limité. On peut se servir d'un projet d'échanges comme d'un outil de sondage d'opinion pour mettre au clair les préférences des contribuables quant à la répartition du budget municipal. Un tel outil possède aussi une fonction éducative du public. On décrit l'application expérimentale d'un projet d'échanges au budget d'une commune rurale.

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be aware of the feasibility of, or costs associated with, alternative levels of service provision. They might change their preferences if they knew the costs involved in their choice, such as increased taxes or reductions in the levels of other services. Secondly, responses in the standard 'satisfaction' survey can be quite ambiguous. Dissatisfaction with a service may mean that the service level is too low, too high, too costly for the quality of service, and so on. Such satisfaction ratings are of limited value for those planning service provision.<sup>9</sup>

The behaviorist approach to overcoming this difficulty is common in market research. In effect, the alternative product is supplied as a trial, with its associated costs, and consumer reaction is observed.<sup>10</sup> In the case of public services it is hardly practical to supply an alternative level of road maintenance, education, or fire protection on a trial basis, partly because the effects of the service at a higher or lower level might not be immediately apparent, partly because the increased (or reduced) costs of particular services would be difficult to identify within the total tax bill. The trade-off game approach<sup>11</sup> is a method which allows residents to assess the implications of increasing or decreasing the funding of various services.

In a trade-off exercise the taxpayer is supplied with a table which indicates for each service the current level of that service and its cost, and feasible alternative levels of service and their associated costs, described in terms of tax dollars to the average taxpayer.<sup>12</sup> The respondent then indicates preferred changes in service by adjusting the tax dollars assigned to each service. In this way the respondent is made aware of the tax implications of either improvements or reductions in the levels of service provision, including what they do to the total tax bill.

The trade-off exercise can be conducted with a fixed or variable budget for services. A fixed budget permits no changes in the total tax bill and improvements in some services can be achieved only by allowing one or more other services to be reduced. This version, which was employed in the case study outlined below, forces respondents to weigh the level and cost of each service against those of all the others. A variable budget for services permits respondents to indicate a preference for a decrease or increase in the total property tax and the overall levels of service, as well as make trade-offs amongst services.

The trade-off method and its use in the context of municipal services is demonstrated for the case of Puslinch Township, Ontario.

## MUNICIPAL PUBLIC SERVICES IN PUSLINCH TOWNSHIP

Puslinch Township, in Wellington County, straddles Highway 401 eighty kilometres west of Toronto. Like

many rural municipalities in southern Ontario, Puslinch has experienced an influx of nonfarm residents, living both in the villages and in the countryside. Between 1951 and 1976 the total population of Puslinch increased from 2900 to 4400, but the nonfarm population increased from 1200 (41% of the total population) to 3800 (86% of the total).

A major portion of Puslinch residential property taxes goes to support the Wellington County school system, which provides special education programs at the secondary and elementary levels, French immersion programs, and bussing for secondary and elementary school children.<sup>13</sup> Puslinch also contributes to the maintenance and winter clearance of the county road system, as well as 185 km of township roads, mostly unsealed. Fire protection in the township is voluntary and the municipality relies entirely upon the Ontario Provincial Police. The township maintains a low level of recreation and library service, and has no municipal garbage collection, water supply or sewage disposal systems.

Certainly, almost all of these services could be up-graded, just as most of them could be reduced. The trade-off approach sketched earlier was employed to provide residents with information on alternative levels of service and their associated costs and to identify residents' preferences for changes in the levels of service provision.

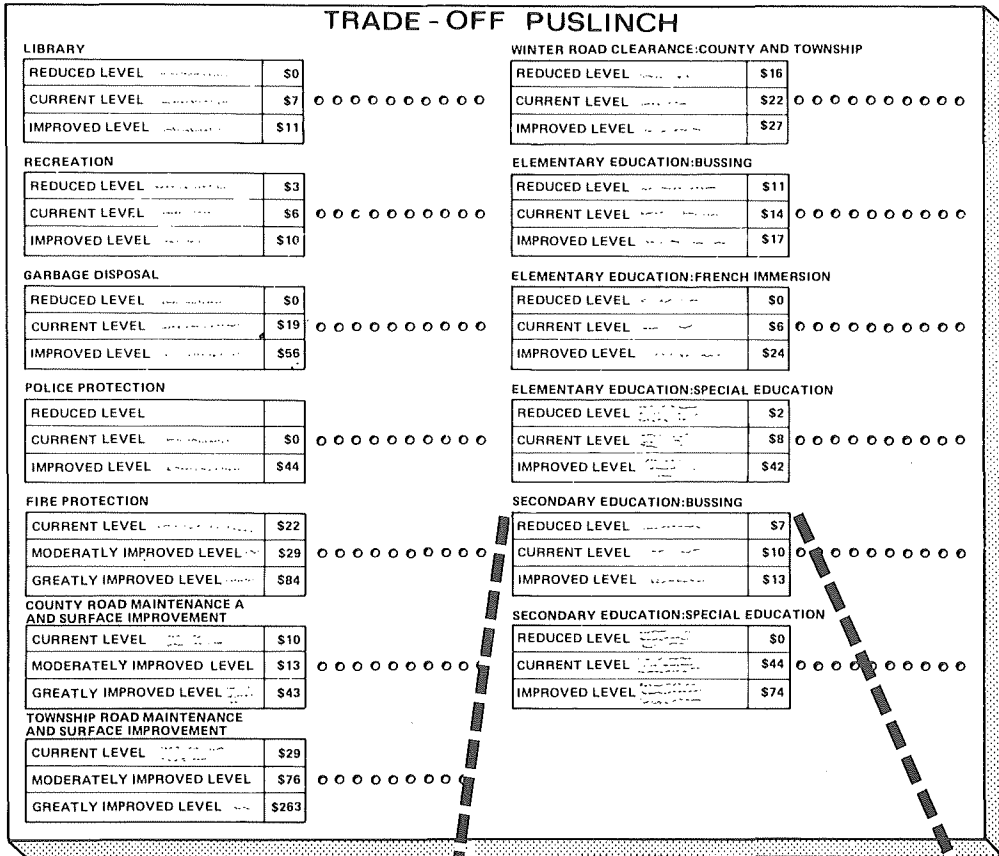
## THE TRADE - OFF GAME

To implement the trade-off method it is necessary to: (1) select discrete and identifiable services; (2) identify and describe existing and alternative service levels; and (3) estimate the cost of existing and alternative levels to taxpayers. In this case study, which is demonstrative rather than definitive, the services included were those whose costs could be separated from general administration, for which alternative levels of expenditure were feasible, and for which cost-data could be obtained.<sup>14</sup>

The trade-off instrument was constructed in the form of the board game shown in Figure 1. For each service the current level was indicated and the cost of the level, in property tax dollars to the average taxpayer, represented by coloured pegs. Thus, for garbage disposal the pegs totalled \$19 (one green for \$10, one red for \$5, four yellow for \$1), representing the cost of the existing level of service to the average taxpayer. Also, for each service an improved level and the associated cost was offered, and for most services a reduced level and its cost also presented.<sup>15</sup> This information on alternative levels of services and their costs was provided by the township and county clerks and officers responsible for providing the services.

The 'game' was played by a randomly selected sample of 130 Puslinch residents. Each respondent examined the game board and identified those services which he/she

**FIGURE 1 THE TRADE-OFF BOARD**



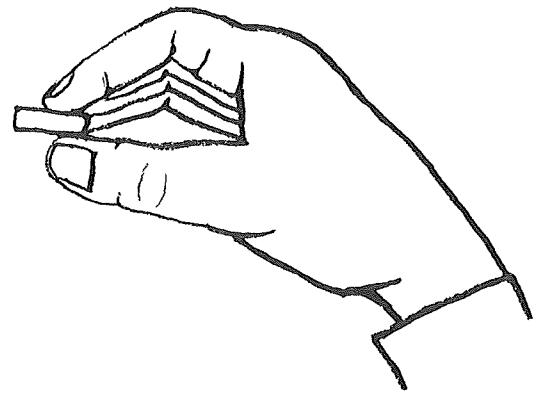
**SECONDARY EDUCATION: BUSING**

<p><b>REDUCED LEVEL:</b> Maximum trip duration for students is 70 min.</p>	\$7
<p><b>CURRENT LEVEL:</b> Maximum trip duration for students is 60 min.</p>	\$10
<p><b>IMPROVED LEVEL:</b> Maximum trip duration for students is 50</p>	\$13

**SECONDARY EDUCATION: SPECIAL EDUCATION**

<p><b>REDUCED LEVEL:</b> 0 schools in Wellington county with facilities for the physically handicapped 0 schools in Wellington County with vocational programs 0 schools in Wellington County with occupations and services</p>	\$0
<p><b>CURRENT LEVEL:</b> 1 school in Wellington County with facilities for the physically handicapped 7 schools in Wellington County with vocational programs 3 schools in Wellington County with occupations and services</p>	\$44
<p><b>IMPROVED LEVEL:</b> All schools in Wellington County with facilities for the physically handicapped All schools in Wellington County with vocational programs All schools in Wellington County with occupations and services</p>	\$74

wished to see improved or would be prepared to allow to deteriorate. The alternative levels on the board indicated changes in a service that could be expected, given a specified change in tax dollars. These specified levels provide guidelines only; respondents could indicate preferred changes by smaller or larger amounts. Given these guidelines, each respondent rearranged the pegs to indicate his/her preferred changes in expenditures on services and hence in the levels of service to be provided. The assignment of more pegs (tax dollars) to a service, for example, would indicate a preference for an improvement in that service to an extent corresponding to the additional pegs (dollars).



In this version of the game the total budget (value of pegs) was fixed at the total current cost of the services included in the game, which accounted for approximately one quarter of the total budget of the township. In order to have one service improved, one or more other services would have to be allocated fewer tax dollars. In this way respondents were forced to consider the cost implications of their improvements, their preferences being constrained by the total budget, just as in reality the options available to municipal officials are limited by the total municipal budget which is politically acceptable.

in Puslinch, it quickly became apparent that residents invariably had little idea as to how their property taxes were apportioned amongst the different services. To gauge the effect that the information on services contained in the game had upon taxpayer attitudes, respondents were asked to indicate at two stages their degree of satisfaction with the provision of services in the township: first at the outset of the interview and again after they had examined the trade-off board and selected their preferred allocations and service levels.

## PUBLIC EDUCATION VIA TRADE-OFF GAMES

One of the advantages of the trade-off approach over other survey methods is that it provides respondents with reliable information on current and alternative service levels and costs. When the trade-off survey was conducted

Before playing the game, respondents found it easy to fault existing township services. After examining the trade-off board and assessing options, there were significantly higher levels of satisfaction with municipal services (Table 1). Indeed, for all services both the average satisfaction and the proportion of respondents satisfied increased after playing the game.<sup>16</sup>

TABLE 1: SATISFACTION WITH SERVICES

Services evaluated	Before Game		After Game	
	Mean of Ratings	% Satisfied	Mean of Ratings	% Satisfied
Library	.344	45	.977	66
Recreation	.157	32	.698	60
Garbage Disposal	.558	56	1.077	75
Police Protection	.625	40	.945	63
Fire Protection	.523	65	.962	88
County Roads	.392	59	.823	71
Township Roads	.115	26	.423	44
Winter Road Clearance	.891	61	1.146	69
Elem. Educ. Bussing	1.328	86	1.383	88
French Immersion	.548	56	1.080	83
Elementary Special Educ.	.714	41	1.073	63
Sec. Educ. Bussing	1.229	81	1.390	86
Secondary Special Educ.	1.134	33	1.324	60

### Notes

In their "After Game" response, respondents were expressing satisfaction with their reallocations as well as with services *per se*. See footnote 16.

Respondents rated services on a 5-point scale, from very satisfied (+2) to very dissatisfied (-2). The 'average responses' are the arithmetic means for the 130 respondents.

"% satisfied" indicates the proportion of the sample who were satisfied or very satisfied with a service.

## PREFERRED CHANGES IN SERVICE PROVISION IN PUSLINCH

The principal objective of the survey was to identify those services which residents would prefer to see improved and those they would be prepared to trade-off. These preferences are presented in Table 2. It shows, for example, that seven respondents, or 5 percent of the sample, preferred to increase the township library service, on average by \$3.00 on the average property tax bill. These seven individuals were obviously prepared to accept a lower level of some other service or services to achieve this. On the other hand, 32 individuals, or 25 percent of the respondents, were prepared to have less spent on the library, on average \$4.87 less, in order to permit improvements in another service or services. However, 70 percent of the respondents left the allocation for library unchanged.

Apart from the four services for which reduced levels were not possible in this exercise, some improvements and reductions were indicated for all services, but each respondent left most allocations unchanged, reflecting the substantial impact of the (realistic) budget constraint. The most frequently improved services were county roads, fire protection, recreation, and elementary school special education. Those most frequently traded-off were the French immersion program, secondary school special education, library, and the township garbage disposal service.

The preferred allocations, averaged over all respondents, are compared to the current allocations in Table 3. These results suggest an overall preference for some improvements in roads, fire protection and garbage disposal services at the expense of some of the education services and the library. The ordering of these priorities is reflected in the percentage changes from the current allocation.

## DIFFERENCES IN SERVICE PREFERENCES WITHIN PUSLINCH

It is apparent from Table 2 that marked differences exist among Puslinch residents in their preferred allocations of property tax revenues to the specified services. It has been suggested that such differences might be expected because long-term residents have different expectations from recent exurbanites or because users of certain services will have a different attitude toward their funding than non-users.<sup>17</sup> Such hypotheses can be tested by comparing the preferred allocations of long-term residents with those of recent arrivals, and those of users of particular services with those of non-users.

The user/non-user hypothesis is examined in Table 4. There is a definite tendency for users of a service to prefer a higher level of expenditure on that service than non-users, although these differences are statistically significant for less than half of the services.

The preferences of respondents grouped according to

**TABLE 2: PREFERRED CHANGES IN SERVICE ALLOCATIONS: FREQUENCY AND VALUE**  
(Dollar cost to the average taxpayer)

Service	Preferred Increase in Service				No Change		Preferred Decrease in Service			
	Respondents		Dollars		Respondents		Respondents		Dollars	
	No.	%	Mean*	S.D.	No.	%	No.	%	Mean*	S.D.
Library	7	5	3.00	1.00	91	70	32	25	- 4.87	2.34
Recreation	24	18	3.42	1.02	96	74	10	8	- 2.20	1.03
Garbage Disposal	5	4	3.60	1.82	100	77	25	19	- 8.64	5.99
Police Protection	12	9	11.75	4.84	118	81	-	-	-	-
Fire Protection	28	21	5.43	2.66	102	79	-	-	-	-
County Roads	28	22	6.07	6.37	102	78	-	-	-	-
Township Roads	15	12	8.07	8.61	115	88	-	-	-	-
Winter Roads Clearance	13	10	2.69	1.55	111	85	6	5	- 3.33	2.16
El. Ed. Bussing	8	6	2.75	.71	108	83	14	11	- 2.71	.61
French Immersion	5	4	8.20	8.98	86	66	39	30	- 4.69	1.85
El. Ed. Special Ed.	16	12	10.06	7.47	110	85	4	3	- 4.25	2.06
Sec. Ed. Bussing	5	4	2.60	.89	115	88	10	8	- 3.00	-
Sec. Ed. Special Ed.	3	2	1.67	1.15	98	75	29	23	11.38	8.28

### Notes

No. = number of respondents.

% = percent of respondents.

Mean = mean of preferred changes, in dollar cost to the average taxpayer.

S.D. = standard deviation about the mean.

\* = The increase or decrease in expenditure on a service can be compared with its current allocation shown in Table 3.

length of residence are compared in Table 5. Although there are some differences in preferred allocations between recent, middle-term and long-term residents, there is little evidence of any significant systematic relationship between length of residence and preferred allocations. The assumption that such differences exist has generated considerable rhetoric on planning issues. Perhaps differences

are apparent when residents are asked simply, which services they would like to see improved. But when they are forced to recognize constraints on service provision and are asked which services they prepared to trade-off in order to attain improvements in others, few significant differences between established and new residents can be identified.

**TABLE 3: CURRENT AND PREFERRED SERVICE ALLOCATIONS**  
(Measured in dollar cost to average taxpayer)

	Current Allocation \$	Mean Preferred Allocation \$	S.D.	% Change
Library	7.00	5.96	2.59	-15
Recreation	6.00	6.46	1.61	7
Garbage Disposal	19.00	17.47	4.41	- 8
Police Protection	-	1.08	3.70	-
Fire Protection	22.00	23.16	2.55	5
Country Roads	10.00	11.31	3.84	13
Township Roads	29.00	29.93	3.84	3
Winter Road Clearance	22.00	22.11	1.28	1
El. Ed. Bussing	14.00	13.88	1.15	- 1
French Immersion	6.00	4.91	3.40	-20
El. Ed. Special Ed.	8.00	9.11	4.30	14
Sec. Ed. Bussing	10.00	9.87	0.98	- 1
Sec. Ed. Special Ed.	44.00	41.50	6.31	- 6

**Notes**

**S.D.** Standard deviation about mean preferred allocation.

**% change** = preferred allocation from current allocation as a percentage of the current allocation

**TABLE 4: DIFFERENCES IN PREFERRED SERVICE ALLOCATIONS**

A. USERS VERSUS NON-USERS	USERS			NON-USERS		
	No.	Preferred level of service (cost to avg. taxpayer)		No.	Preferred level of service (cost to avg. taxpayer)	
		Mean \$	S.D.		Mean \$	S.D.
Library	19	6.21	1.99	111	5.92	2.68
Recreation	47	6.91*	1.68	83	6.20*	1.52
Garbage privately collected	53	17.66	3.99	77	17.35	4.69
Garbage resident takes to dump	96	18.02	3.54	34	15.94	6.04
Police Protection	63	1.54	4.63	67	66	2.48
Fire Protection	17	22.35*	1.22	113	23.29*	2.67
El. Ed. Bussing	51	14.22*	1.06	79	13.66*	1.15
French Immersion	4	5.25	1.50	126	4.90	3.45
El. Ed. Special Ed.	2	17.50	13.43	128	8.98	4.03
Sec. Ed. Bussing	31	10.03	.79	99	9.92	1.03
Sec. Ed. Special Ed.	2	44.00*	0.0	128	41.46*	6.35

**B. BY CLASS OF ROAD THAT RESPONDENTS LIVE ON**

	PAVED (44 Respondents)		BITUMEN (22 Respondents)		GRAVEL (64 Respondents)	
	Mean \$	S.D.	Mean \$	S.D.	Mean \$	S.D.
County Roads	11.66	5.38	12.13	4.06	10.78	2.10
Township Roads	29.18*	.87	29.91	4.26	30.45*	4.79
Winter Road Clearance	22.25	1.60	21.73	1.28	22.16	1.00

**Notes**

**No.** = number of respondent households who used the service in the previous five years.

**Mean \$** = mean of preferred allocations, in dollars to the average taxpayer.

**S.D.** = standard deviation about mean \$

**\*** = denotes pairs of means for a service that are statistically different at the .05 level (via student's t-test).

## SUMMARY OF RESULTS

This demonstration of the trade-off method to selected services in Puslinch township illustrates its potential as a technique to identify community preferences in a realistic budget environment. The importance of distinguishing between *constrained* preferences elicited in this way and *unconstrained* preferences identified via simpler surveys is evident from comparison of the data in Tables 1 and 3. Prior to playing the game, more than 50 percent of the respondents were dissatisfied with the current level of six of the 13 services listed (Table 1). But when faced with the realities of a fixed budget for services, respondents, on average, increased allocations to only four of these six services (recreation, police protection, township road maintenance and elementary special education) while actually reducing allocations, on average, to library and secondary special education.

Although attempted here only in an illustrative way, the trade-off method also makes it possible to relate variations in preferences within a community to various characteristics of the population. This is clearly of relevance in situations where the composition of community populations is changing rapidly, for it may be possible, given known group demands, to extrapolate the service provision implications of a specific population trend.

## ASSESSMENT AND APPLICATIONS

This technique for eliciting constrained preferences, applied here to municipal services in a rural township, could be similarly applied to other sets of services, and/or in urban municipalities, and/or at other levels

of government. In many such situations, of course, services evaluation may not be the planner's prerogative and his/her contribution limited to applying this survey technique. A number of modifications to the game are feasible too. An obvious extension would be to allow respondents to change the total tax bill when reallocating the budget amongst the services. This would permit assessment of the degree to which residents would prefer to increase or decrease the overall level of services provision and pay more or less municipal taxes.<sup>16</sup>

The trade-off approach does have a number of practical difficulties which should be noted.

Use of the technique requires common sense and the cooperation of municipal administrators as much as any special technical expertise. An important initial task in setting up a game board is defining the categories of services to be included. It may be desirable to leave some categories of service out, for example general administration or, as was done in the Puslinch study, assume it to be distributed proportionally. Similarly, decisions are needed on whether to include other services, such as general education, perhaps described with reference to class sizes.

A related issue concerns the service levels other than the current one that respondents are permitted to opt for when reassigning the budget. For some services, such as for education, health standards, etc. minimum allowable levels might have to be set to reflect legal requirements. Some services can be supplied and costed only in discrete units. These could be accommodated in the trade-off game by allowing adjustments in these services only by fixed amounts or units. However, it is at this point that potential problems of comprehension by respondents must be considered. Additional 'rules' might enhance the sophistica-

TABLE 5: DIFFERENCES IN PREFERRED ALLOCATIONS: LENGTH OF RESIDENCE

Service	Under 5 years (41 respondents)		5 - 15 years (43 respondents)		Over 15 years (46 respondents)	
	Means \$	S.D.	Mean \$	S.D.	Mean \$	S.D.
Library	5.66	3.13	5.88	2.38	6.30	2.22
Recreation	6.56	1.86	6.42	1.43	6.41	1.56
Garbage Disposal	16.02 *	6.03	18.28 *	2.69	18.02	3.71
Police Protection	1.34	4.08	1.21	4.11	.74	2.89
Fire Protection	23.68	2.86	23.02	2.22	22.85	2.53
County Roads	11.80	5.02	10.46	1.39	11.65	4.14
Township Roads	30.32	5.43	29.30	1.21	30.17	3.75
Winter Road Clearance	22.44 *	1.45	21.74*	1.45	22.17	.80
Elem. Educ. Bussing	13.73	1.45	14.14	.91	13.76	1.01
French Immersion	6.07 *	4.58	4.81	2.16	3.96*	2.82
Elementary Special Ed.	9.63	5.24	9.81*	5.05	7.98*	1.64
Second Educ. Bussing	9.88	1.34	9.93	.80	9.80	.75
Secondary Special Ed.	39.85*	7.36	41.28	7.14	43.17*	3.60

### Notes

Means = mean of preferred allocations, in dollars to the average taxpayer.

S.D. = standard deviation about mean \$.

\* = denotes pairs of means for a service that are significantly different at the .05 level (via student's t-test).

tion and perhaps the accuracy of the game, but they might also make it too complex to be effective.<sup>19</sup> In the form described here the instrument could be applied in interviews averaging 30 minutes, during which respondents were able to comprehend the game board and play the game very quickly after a short explanation.

## CONCLUSION

Trade-off games of this type have the potential to contribute to the service provision issue in several ways. This paper has focussed on the method as a survey technique to gather informed public opinion, to be interpreted by the staff for use in deliberations on future service provision and funding. In this way the trade-off technique is another tool in the arsenal of those responsible for the planning and provision of services. It provides information on public preferences for service expenditures but clearly, it does not recommend allocations. Thus, while the results permit minority interests to be readily identified, the method does not indicate how legitimate minority service interests should be met.

Tools of this type might also be of value to municipal officials, who ultimately have to determine tax rates and apportion tax revenues amongst services. Fiscal modelling tools are becoming popular, at least in larger centres, to help in this task. The decisions made in the trade-off game being a close approximation of those made annually at municipal budget time, a version of the trade-off board might be developed which provides councillors and staff with an experimental framework to decide priorities and budget allocations.

Public participation, to be effective, requires a communication in both directions. One of the most valuable attributes of the trade-off game is its ability to inform respondents about the apportionment of their tax dollars and to give them insight into the major constraints within which municipal services are provided. It could be argued that a community benefits from a survey of this type if residents are more satisfied with their services and taxes, even if this is not because the taxes or services have changed, but because residents now recognize the connection between the two.

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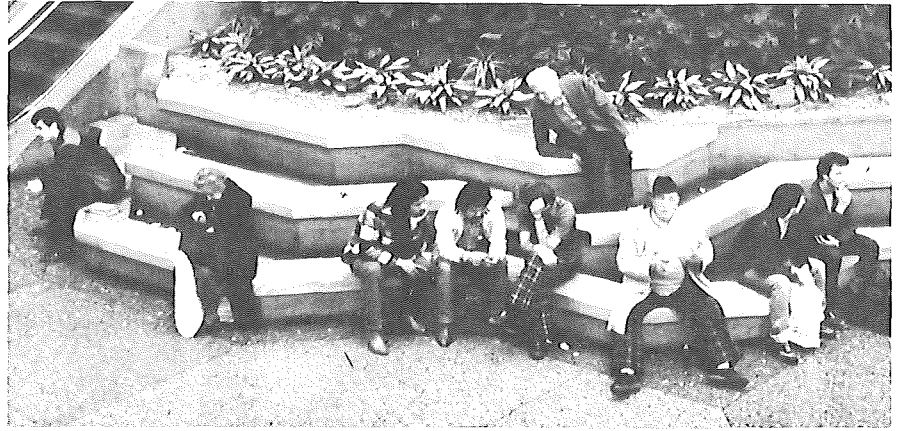
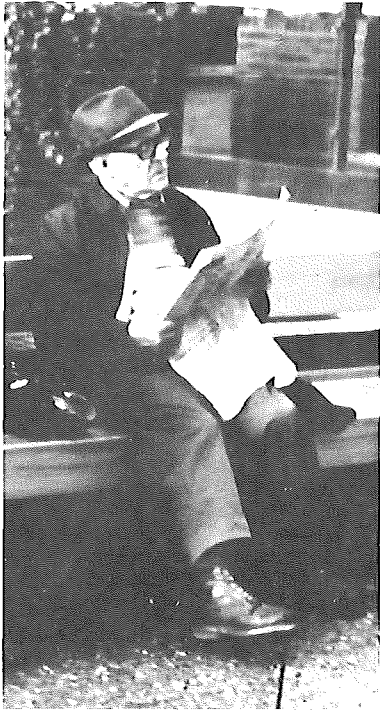
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## Notes

**We are grateful to the officials and residents of Puslinch Township for their co-operation in the data collection, to Mr. Mark Flaherty for his assistance with the analysis, and to the Social Science and Humanities Research Council of Canada and the Ontario Ministry of Agriculture and Food for their financial support. Anonymous reviewers provided useful suggestions on the manuscript.**

1. It was this sort of problem which culminated in Propositions 13 and 2½ in California and Massachusetts, respectively, and which confronts municipalities across North America and elsewhere.
2. For example, see S. Murrell, "Utilization of Needs Assessment for Community Decision-Making," *American Journal of Community Psychology* Vol. 5, 1977, pp. 461-468, and G. Whitaker, "Co-production: Citizen Participation in Service Delivery," *Public Administration Review*, Vol. 40, 1980, pp. 240-246.
3. Concern with property tax levels is discussed by L. Hennigh, "The Good Life and the Taxpayer Revolt", *Rural Sociology*, Vol. 43, 1978, pp. 178-190. More generally, the importance of the property tax versus service level issue is reflected in the frequency of reports in community newspapers, the setting up of ratepayers' pressure groups, and so on.
4. A general perspective on this issue is provided by A.S. Williams "Planning Service Delivery Systems for Rural Sparsely Populated Areas" in D.L. Rogers and L.R. Whiting (eds.), *Aspects of Planning for Public Services in Rural Areas*, Ames, Iowa: North Central Regional Centre for Rural Development, Iowa State University, 1977, pp. 202-234.
5. J.D. McRae, *The Influence of Exurbanite Settlement on Rural Areas: A Review of the Canadian Literature*, Ottawa: Lands Directorate, Environment Canada, 1980.
6. A discussion of the service provision implications of changes in the structure of rural populations is provided in A.E. Joseph and B.E. Smit, "Implications of Exurban Residential Development: A Review", *Canadian Journal of Regional Science*, Vol. 4, 1981, pp. 207-224.
7. J. Friedmann, "The Public Interest and Community Participation: Toward a Reconstruction of Public Philosophy", *Journal of the American Institute of Planners*, Vol. 39, 1973, pp. 2-7, W.F. Kaemmerer and A.I. Schwebel, "Citizen Participation in Community Planning: a Simulation of the Citizen-Planner Information Exchange Process," *American Journal of Community Psychology*, Vol. 5, 1977, pp. 249-253.
8. H. Hatry and L. Blair, "Citizen Surveys for Local Governments: A Copout, a Manipulation Tool, or Policy Guidance and Analysis Aid?" in T.N. Clark (ed.), *Citizen Preferences and Urban Public Policy*, Beverly Hills, California: Sage, 1976.
9. This type of survey is well illustrated and assessed in the context of rural services by J.J. Molnar and J.P. Smith, "Satisfaction with Rural Services: The Policy Preferences of Leaders and Community Residents," *Rural Sociology*, Vol. 47, 1982, pp. 496-511.
10. Approaches to the measuring of community preferences for service provision are discussed by B.E. Smit and A.E. Joseph, "Trade-Off Analysis of Preferences for Public Services," *Environment and Behavior*, Vol. 14, 1982, pp. 238-258.

11. A description of trade-off games and their use in opinion surveys is given by I.M. Robinson et. al., "Trade-off Games" in W. Michelson (ed.), *Behavioral Research Methods in Environmental Design*, Stroudsburg, PA: Dowden Hutchinson and Ross.
12. Costs could be measured in various ways, including actual values of the total municipal budget, or as cents for each tax dollar. However, the measure, tax dollars to the average taxpayer, not only provides a value by which one service can be compared with another but also gives an indication of the absolute cost to a resident.
13. Details on the nature and costs of municipal services provided to the residents of Puslinch Township are provided in A.E. Joseph, B.E. Smit and A. Poyner, *The Provision of Municipal Public Services in Wellington County*, Department of Geography, University of Guelph, Studies in Rural Adjustment, Report No. 10, 1980.
14. The selection of services for inclusion in the game is discussed in A.E. Joseph, B.E. Smit and A. Poyner, *ibid.* This study was dependent upon the data the service agencies and officers were prepared to provide.
15. Reduced levels for fire and police protection were not considered to be feasible. For the two road services (county and township) no reduction was offered because of the difficulty of accurately describing and costing a planned deterioration of the road network.
16. Apart from the limitations of satisfaction surveys noted earlier, this method of gauging the educational impact of the game is far from perfect because in their second response to the service satisfaction question, respondents were indicating their satisfaction with their reallocations as well as with the services *per se*. However, the degree of change in satisfaction levels far exceeds what would be expected on the basis of the relatively small number of reallocations for most services (Table 2).
17. A.E. Joseph and B.E. Smit, *op. cit.* Clearly, there might also be grounds for proposing differences in preferences used upon various other characteristics of respondents, such as age, occupation, formal education, or household income.
18. A recently completed study in another rural township in Ontario has shown that when given the option (in the trade-off game) of changing the budget, 41 percent preferred the status quo and 40 percent preferred an increased budget and the accompanying improvement in services, while only 19 percent preferred to save taxes by sacrificing service quality; see A.E. Joseph, B. Smit, K.B. Beesley, *Public Input into Planning for Municipal Service Provision: A Method and Case Study*, Department of Geography, University of Guelph, Studies in Rural Adjustment, Report No. 14, 1982.
19. Robinson, et al., and sources they cite, provide some experience and judgements related to these points.



# The behavior of elderly people in Montreal's 'Indoor City'

Pieter Sijpkens, David Brown and Michael MacLean

## ABSTRACT

With the proliferation of indoor shopping centers in North America, it is important to determine whether the classic city-center functions can be incorporated into privately owned indoor environments. As a first step in addressing this question, this study focuses on how two different environments within Montreal's "indoor city" are used by the elderly. Place Ville Marie (PVM) is essentially a single-storey system of boutique-lined pedestrian corridors; Complexe Desjardins (CDJ) combines extensive shopping facilities with a large indoor multilevel public area. Data were collected from behavioral observations of the elderly as well as interviews with older people, shopkeepers and security guards.

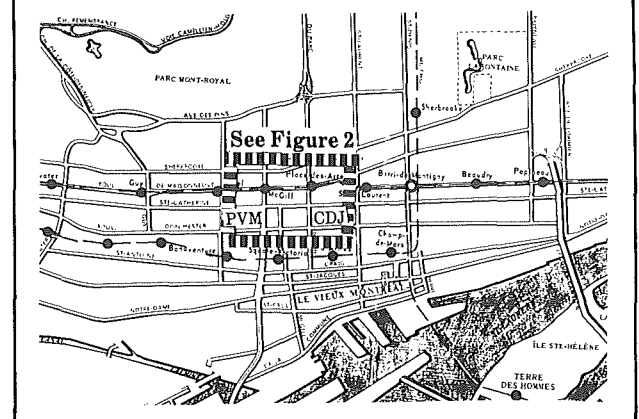
Substantial differences between the two centres with respect to the numbers of elderly men and women, their activities and group structure, indicate that the two environments fulfill different functions. PVM is essentially used for retail functions, and clientele do not feel encouraged to engage in social functions such as meeting friends, people watching, and relaxing. CDJ appears more successful as an "indoor city" in meeting these needs.

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## INTRODUCTION

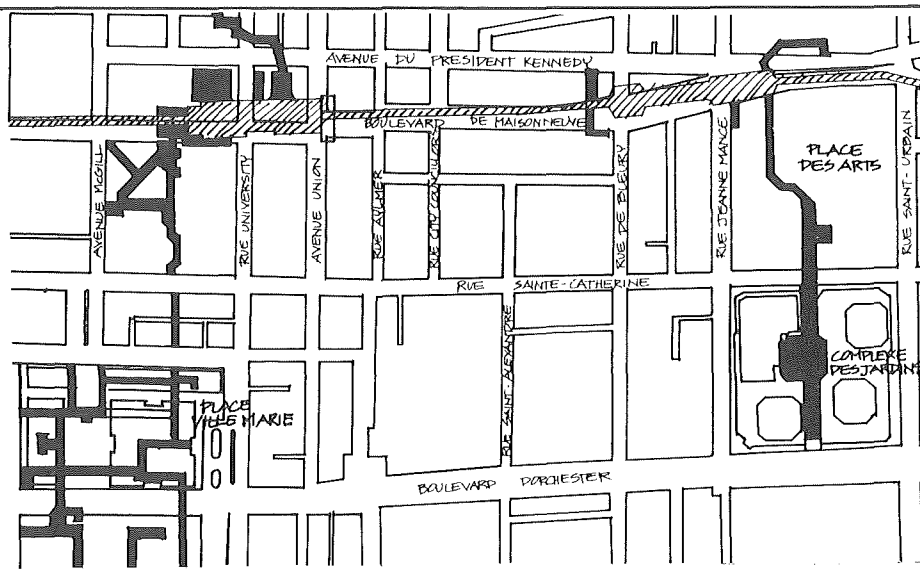
Metropolitan Montreal's downtown core has been dominated since the early sixties by the towering presence of Place Ville Marie, a multi-purpose complex which, apart from being the first skyscraper, introduced large scale indoor public commercial spaces to the city. This pattern of highrise office development combined with indoor shopping malls proved very successful, and the system has since been greatly expanded to include many miles of indoor malls, public spaces and underground links between various nodes. A great boost was given to the "indoor city" by the opening of the subway (Metro) in 1966. Complexe Desjardins, which opened in 1977, is one of the more recent additions.

FIGURE 1 THE METRO SUBWAY AND THE TWO CENTRES



**FIGURE 2**  
**RELATIONSHIP OF THE**  
**TWO CENTRES TO**  
**UNDERGROUND WALKWAYS**  
**AND METRO SUBWAY**

 Metro Subway  
 Underground Walkway



The indoor system was initially regarded as a real boon to Montreal. Peter Blake in a 1966 article in *Architectural Forum* stated:

Through a happy combination of expert foresight, private initiative and luck, Montreal is about to become the first twentieth century city in North America... but what sets this core apart is not so much the towers as their spreading roots in a multi-level of shops, transportation systems, and pedestrian promenades.

The raison d'être of the indoor shopping system is, of course, merchandising. However, in an urban environment with the extremes of climate of Montreal, the indoor system is more and more asked to perform as a city, rather than simply as an endless commercial mall: demands for more seating, recreation, and spatial variety are increasing. Several voices have expressed concern about its un-planned expansion. Shostock (1978) criticized its general environmental aspects, as have editorials in the main Montreal newspapers. A perceptive criticism of the un-

necessary "underground" atmosphere of the environment was raised in Jean Claude Marsan's classic book *Montreal En Evolution* (1974).

In the most narrow sense, success and failure of shopping centres is measured by the rate of return on investment. The danger of exclusively defining success or failure this way was clearly illustrated by Ircha (1982) who explored the broader implications of shopping center development in the Atlantic provinces. Similarly, the success or failure of indoor environments in the Montreal context cannot be answered simply by a glance at the "bottom-line". The interdependency of the system with the publicly owned Metro, other public buildings as well as its relationship with the rest of "outdoor Montreal" makes judging its performance a difficult task.

This study attempts to explore the social functions of the indoor system and relate these to the physical public

## Résumé

### COMPORTEMENT DES PERSONNES AGEES DANS LA "CITE SOUTERRAINE" DE MONTREAL

Avec la prolifération des centres commerciaux souterrains en Amérique du Nord, il est important de déterminer si les fonctions classiques d'un centre-ville peuvent être associées à un environnement souterrain relevant de la propriété privée. Comme première étape pour s'attaquer à ce problème, cette étude se concentre sur la façon dont les personnes âgées utilisent deux environnements différents dans la "cité souterraine" de Montréal. Place Ville Marie (PVM) est essentiellement un réseau de corridors piétonniers bordés de boutiques sur un seul niveau. Le Complexe Desjardins (CDJ) com-

bine des installations commerciales de grande envergure à une vaste superficie, souterraine et à plusieurs niveaux, destinée au public. On a recueilli des informations en observant le comportement des personnes âgées et en interviewant certaines, ainsi que des commerçants et des gardes chargés de la sécurité.

Des différences appréciables entre les deux centres, quant au nombre des femmes et des hommes âgés, leur activités et la composition de leur groupe, indiquent que les deux environnements remplissent différentes fonctions. PVM a essentiellement une fonction de commerce de détail, et la clientèle ne se sent pas encouragée à se lancer dans des activités sociales telles que rencontrer des amis, regarder passer les gens et se détendre. CDJ semble connaître plus de succès en tant que "cité souterraine" répondant à ces besoins.



**Complexe Desjardins**



**Place Ville Marie**



facilities available. We have focussed on Place Ville Marie, the initiator of the system and on Complexe Desjardins, a recent addition. Both Place Ville Marie and Complexe Desjardins are in the center of Montreal approximately one kilometer from each other (Figure 2). Place Ville Marie is in the heart of the Central Business District, while the east side of Complexe Desjardins borders on a mixed use, low-income area with a high percentage of elderly residents. However, the close proximity of these centres and their equally easy accessibility by public transit and under-

ground pedestrian links makes their geographic location a minor variable with respect to their attractiveness to the elderly. The quality of the indoor space varies considerably between these two centers. Complexe Desjardins has two levels of shopping grouped around a large four storey atrium where concerts and exhibitions are frequently held, benches with a combined seating capacity of several hundred people, foliage, lots of daylight, as well as a variety of shops, restaurants and public washrooms.

Place Ville Marie has a corridor system with benches seating two dozen people, very little daylight and no foliage or decorative water; there are many shops, two cinemas, restaurants and public washrooms. Both complexes are linked through underground passages to other centers and the subway system.

These complexes have taken on an important, albeit largely unplanned function of providing indoor space which many segments of the population use for recreational purposes. The users can be divided into shoppers (or potential shoppers such as office workers taking a lunch break, and non- or marginal shoppers, to a large extent the elderly, teenagers and the unemployed. Non-shoppers have lots of non-structured time on their hands and little money to spend. The behavior, numbers and characteristics of shoppers are of keen interest to the management and lessees of any shopping center and generally well documented. The number and behavior of the non-shoppers are not as well documented, the conventional wisdom being 'the fewer the better' (Whyte, 1980). We chose the elderly as a surrogate group for all the "non- or marginal shoppers" because they form an easily identifiable group.

As well, the elderly constitute an important study group due to their increasing numbers and special re-

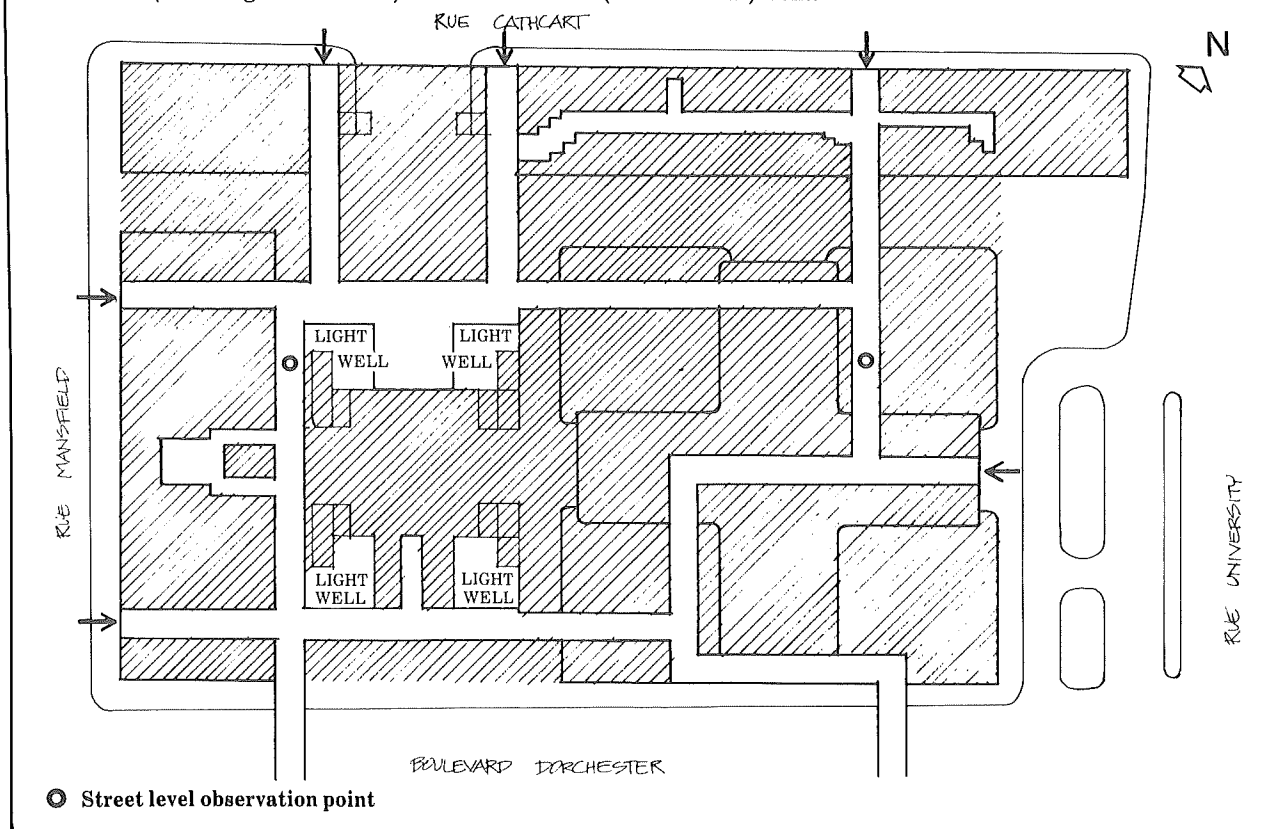
quirements. In Canada, approximately 53% of the elderly population lives in urban areas of 100,000 or more people (Stone and Fletcher, 1980). Because of these substantial numbers, much research has recently been devoted to such fundamental concerns of the elderly as transportation (Stirner, 1978), housing (Eckert, 1979), crime (Yin, 1980) and shopping behaviour (Mason and Beardon, 1978). This recent research has provided some insight into how the elderly adapt to changes in the urban environment.

## METHOD

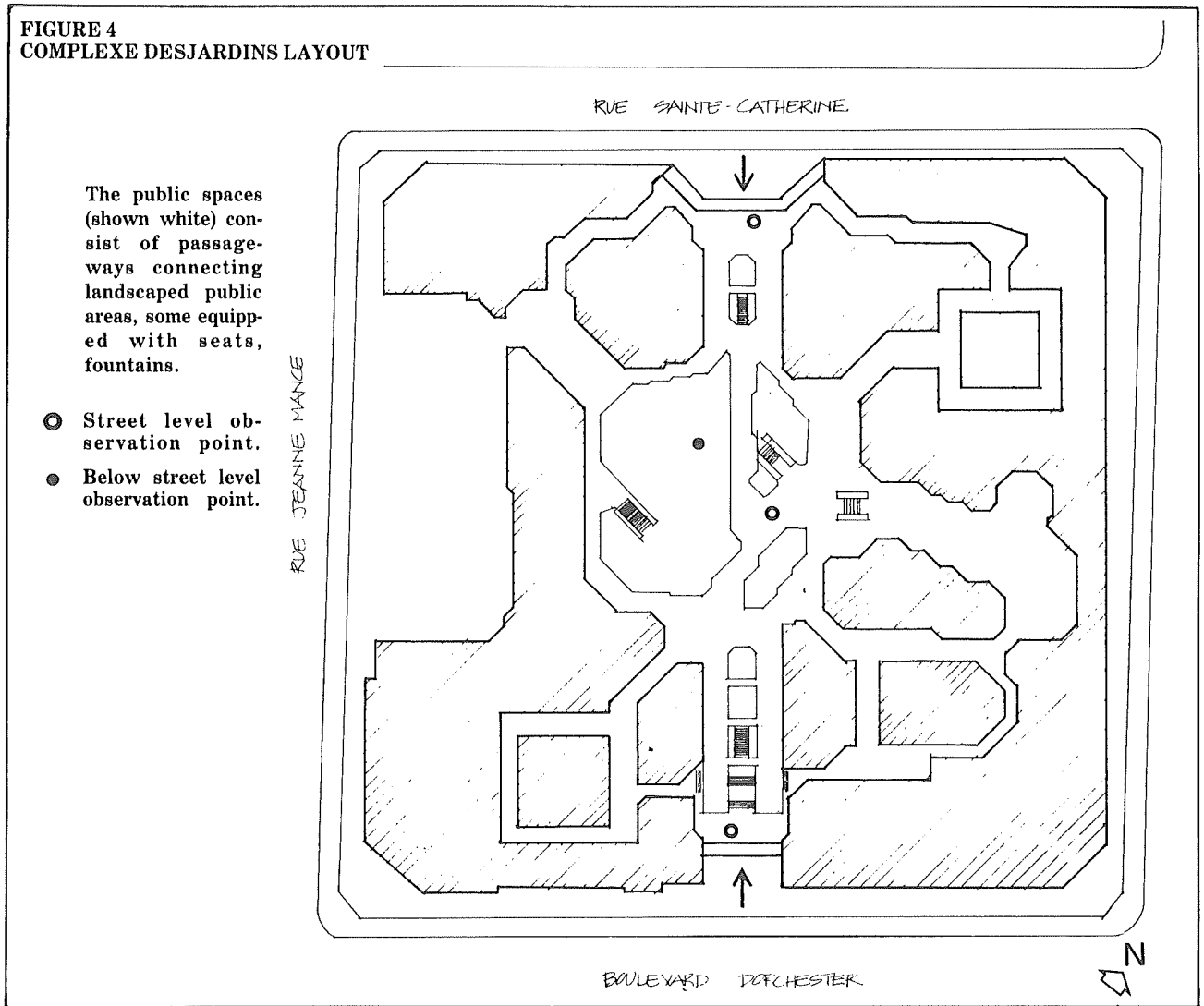
Several field observation and interview techniques were employed to determine whether elderly people behave differently in the two environments and the use to which each environment is put: place-centered observations, and interviews with users, shopkeepers and security guards. These were based on Ittelson et al's (1974) description of place-centered and person-centered observations and Zeisel's (1981) synopsis of environment-behavior research. Several observation areas within Place Ville Marie and Complexe Desjardins were selected which would reflect use of the major components of the public space each provides. In Place Ville Marie, with its relatively straightforward corridor layout, two primary corridors were observed on a regular basis.

**FIGURE 3 PLACE VILLE MARIE LAYOUT**

The public spaces (shown white) in this centre are limited to narrow passageways (on average 25 feet wide) on which the stores (hatched areas) front.



**FIGURE 4**  
**COMPLEXE DESJARDINS LAYOUT**



Four areas were observed in Complexe Desjardins: the main entrances; the upper level, including the center aisle and balconies; and the Metro level, which includes the entertainment area.

In each area the behavior of people who appeared to be 65 years of age or older was noted. For each observation a record was kept of the activity performed (sitting; relaxing, reading, eating, or talking; strolling; walking briskly; shopping or standing). The observation category (male alone, female alone, male pairs, female pairs, couples and groups – with further specification as to the number and sex of members of each group) was also noted. While observations were made concerning dress there was insufficient variation to permit analysis of this information.

Observation periods were initially stratified by the time of day and day of week, but during analysis this information was simplified to distinguishing between weekdays, Saturdays, and Sundays and between morning (7-12 a.m.), noon (12-2 p.m.), afternoon (2-6 p.m.) and evenings (6-12

p.m.). The number of observation periods were as follows:

	Place Ville Marie	Complexe Desjardins
Weekdays	48	49
Saturday	28	31
Sundays	10	14
	<u>86</u>	<u>94</u>

All observations were made during July 1981, to explore the way the elderly use the indoor environment in the summer, when the use of outdoor public space is not prohibited by the weather.

Tallying observations at a number of sites within each environment was intended to reveal any special concentration of the elderly. However, the distribution among the sites was found to be statistically insignificant; observation data for all sites within each indoor area were combined to compare the two complexes.

## RESULTS

### Place-Centered Observations

A measure of the relative attractiveness of the public indoor space of Place Ville Marie and Complexe Desjardins for elderly persons is the number of people observed in each environment. The numbers presented in Figure 5 suggest that the two environments are playing different roles.

On weekdays, Complexe Desjardins is more popular with an average of 16 elderly people per observation period as opposed to 11 in Place Ville Marie. On weekends, Complexe Desjardins remains more attractive Sunday (12-CDJ, 9-PVM), but on Saturday the count was identical (12-CDJ, 12-PVM). Variations between the total number of elderly observed were significant ( $\chi^2 = 20.7; p < 0.01$ ).

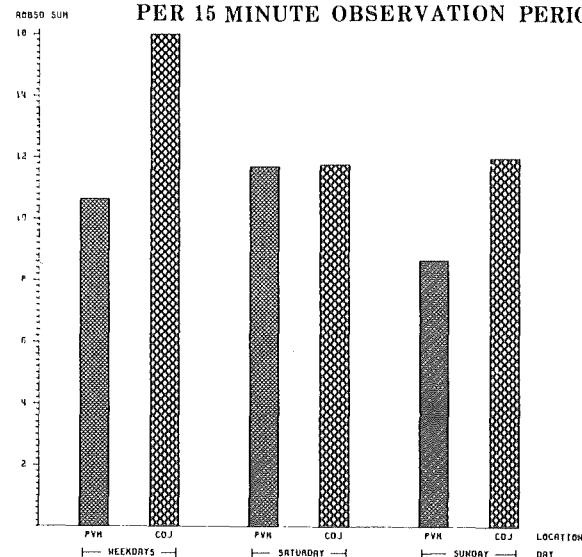
The special role of Complexe Desjardins becomes more explicit when one considers the activities of older persons and the time of day during which they occur (Figure 6). On weekdays, a fairly regular pattern is followed in Place Ville Marie: a peak at noon and gradual decline in the afternoon and evening. Complexe Desjardins, however, attracts a substantial number of older people in the morning, declines at noon, then increases dramatically in the afternoon and evenings. The variations in daily rhythm between the two environments were found to be statistically significant ( $\chi^2 = 67.4; p < 0.01$ ).

The pattern of activity at Complexe Desjardins invites a number of hypotheses. It is possible that older persons living within the inner city are essentially replicating the rhythm of a working day by arriving in the morning, going home for lunch, and returning in the afternoon. The decline at lunch may as well be explained by the presence of office workers competing for sitting space during this period. The differences in the types of activities by elderly persons in the two environments are of course strongly influenced by the facilities available: more people are likely to be sitting where there are more places to sit. The availability of facilities, however, not only influences activities performed, but also the type of people attracted to the environment.

Significant differences were evident in the sex and group patterns of the elderly attracted to the two environments. On weekdays, men were much more numerous in Complexe Desjardins than in Place Ville Marie, 61% and 35% of total persons observed respectively. Conversely, women were much more likely to be found in Place Ville Marie.

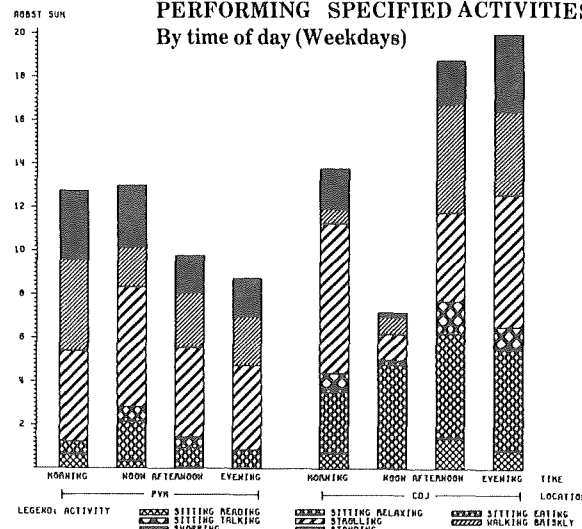
These differences between the two environments go beyond the relative predominance of sex. Table 1 reveals dramatic differences in the grouping of individuals during the weekdays. Men alone represent 44% of all groupings observed in Complexe Desjardins and only 17% of those in Place Ville Marie while comparable figures for women

**FIGURE 5 AVERAGE NUMBER OF ELDERLY PER 15 MINUTE OBSERVATION PERIOD**



As the total observation time varied by time of day and day of week for each environment, it was necessary to standardize the raw figures by dividing by the number of 15 minute observation periods.

**FIGURE 6 AVERAGE NUMBER OF ELDERLY PERFORMING SPECIFIED ACTIVITIES By time of day (Weekdays)**



**TABLE 1 PERCENTAGE OF ELDERLY PEOPLE OBSERVED BY SEX AND COMPANIONSHIP ON WEEKDAYS**

	PVM	CDJ
Men alone	16.7	44.2
Women alone	18.3	9.1
Men in pairs	1.4	4.3
Women in pairs	27.4	16.0
Couples	27.4	19.6
Men in groups	2.8	2.4
Women in groups	6.0	3.9
Total men	34.6	60.7
Total women	65.4	39.3

Percentages do not total 100% due to rounding.

alone were 9% and 18%. Male pairs were less frequent in both environments than men alone, (1% Place Ville Marie, 4% Complexe Desjardins) yet the converse is true for women (27% place Ville Marie, 17% Complexe Desjardins). Couples (a man and woman) were more evenly distributed: 27% in Place Ville Marie and 20% in Complexe Desjardins. These differences in observation categories are statistically significant ( $\chi^2=141.2$ ;  $p<0.01$ ). The high percentage of men alone in Complexe Desjardins strongly influences the percentage distribution for all other groups. If we compared Place Ville Marie and Complexe Desjardins disregarding this one high figure (44.2%), a much smaller percentage spread for all other groups emerges.

These results suggest that the general openness of Complexe Desjardins and the availability of seats is particularly attractive to men alone. Women are much less likely to spend time in this type of environment and are more likely, when they do come, to be accompanied by another person. Place Ville Marie on the other hand is apparently more comfortable for women either alone or with others.

While variety in the facilities offered affects the activities performed within each environment and the type of clientele selecting that environment, the availability of facilities does not greatly influence the tendency of any group to engage in particular activities. For example, although Place Ville Marie and Complexe Desjardins have very different facilities, higher percentages of men alone, men in pairs and women in groups engage in sedentary activities (sitting or standing), than is the case for women alone, women in pairs, couples and men in groups (Table 4).

In Place Ville Marie, walking is the predominant activity for all group categories. In Complexe Desjardins walking remains a principal activity for women alone, women in

pairs, couples and men in groups, but men alone, men in pairs and women in groups were more likely to take advantage of the seating facilities available. In Ville Marie shopping is done primarily by women and couples. This situation is similar in Complexe Desjardins although much less shopping is done by all observation categories.

### Person-Centered Observations

In addition to behavioural observations, interviews were conducted with twenty older persons in each centre. Elderly men and women were asked about their perceptions of the complex they were in, how often they came what they did, and how they thought it compared with the other one considered in this study.

The elderly at Place Ville Marie use it for functional reasons such as shopping and business errands. A woman, approximately 65 years of age, commented

I come to Place Ville Marie only when I have something to do, like cashing a cheque or shopping. I like it here as there are decent people here, there are no hassles. I've been to Complexe Desjardins and it's nice but I don't like to spend too much time there as there are too many drunks. I prefer Place Ville Marie.

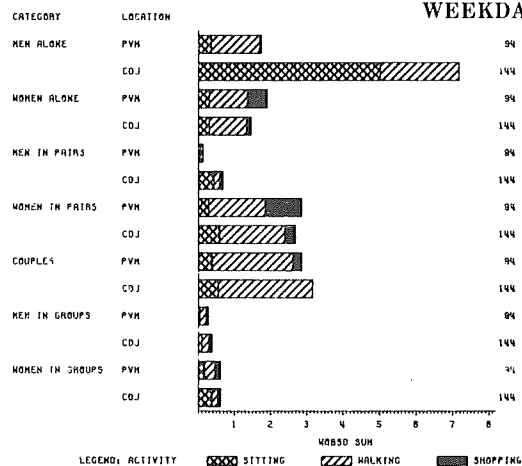
A man, approximately 75 years of age, in the same vein said

I like coming here. I come here about twice a month mostly on business like cashing a cheque or shopping. I find it hard to compare Place Ville Marie with Complexe Desjardins as I don't go there very often. I prefer Place Ville Marie.

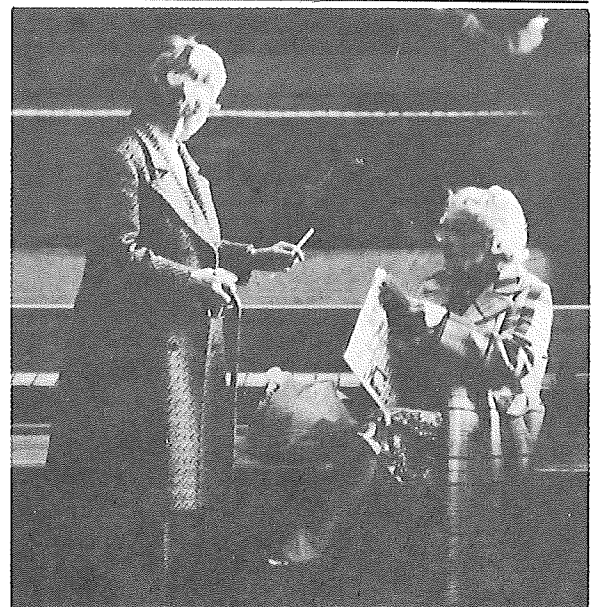
In contrast the elderly men and women interviewed in Complexe Desjardins tended to stress the leisure aspects of this complex. A retired man, approximately 65 years, who comes to Complexe Desjardins two or three times a week to sit, read, relax and watch performances, said

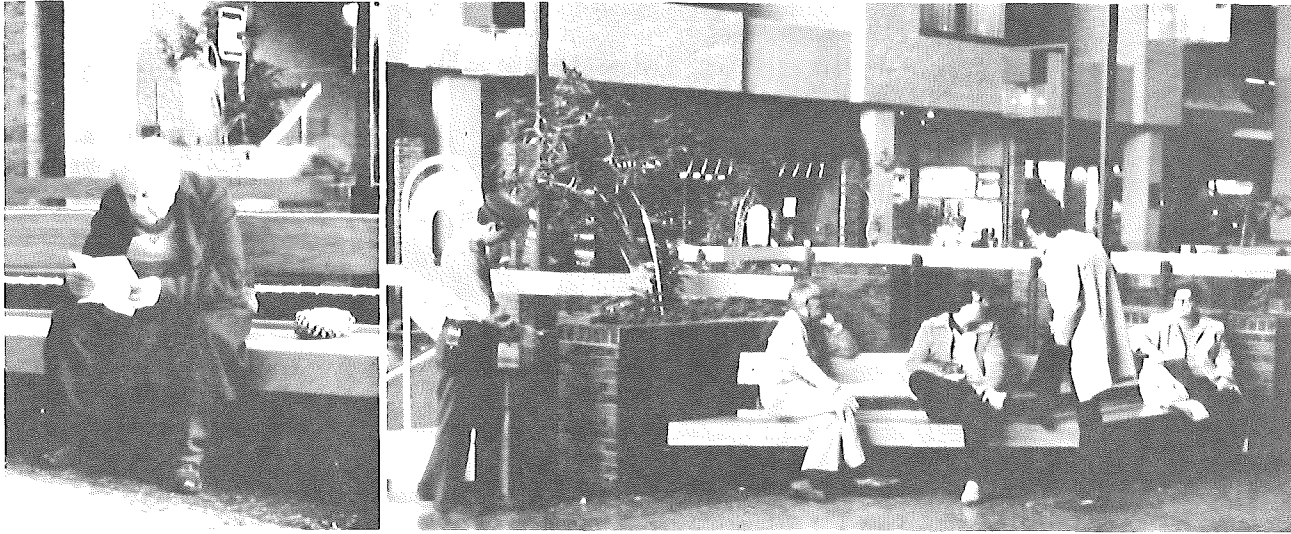
Complexe Desjardins is very interesting, large, has lots of places to sit, good temperature and is a good place to spend some time. Place Ville Marie is too rushed... there are not enough places to sit and relax.

**FIGURE 7 AVERAGE NUMBER OF ELDERLY BY SEX AND COMPANIONSHIP WEEKDAYS**



"Sitting" includes standing and all other sedentary behaviour. "Walking" includes strolling and walking briskly.





**And a woman, approximately 65 years of age:**

I come to Complexe Desjardins often. It's quiet, a good place to spend some time, to relax. The water, plants and coolness give it a welcoming look. I've been to Place Ville Marie but one doesn't go there to relax or spend time chatting with a friend. It's a place of business.

Those comments suggest that the two complexes are perceived differently: Place Ville Marie as a place of business with less emphasis on leisure, Complexe Desjardins as a place of leisure alone. Yet regardless of their perception, all elderly stated a preference for the centre in which they were interviewed.

Some elderly men, seen regularly in Complexe Desjardins and Place Ville Marie during the month of observation, were watched for an hour to see what they did, then interviewed. In all cases they had done exactly what they subsequently described as their activities. All seemed to have individual routines which they followed, routines they liked. A 79 year old man:

I come here (Complexe Desjardins) every morning to pass the time for about two hours. I never come in the afternoon or evenings. I feel very comfortable here as nobody bothers me.

Security guards and shopkeepers at each centre, when interviewed about their attitudes towards the elderly, commented very favourably on them. That security guards treated them with respect and courtesy was confirmed by some of the interview responses by elderly persons. It was also observed that there was little change in the behaviour of the elderly when guards walked by. From these observations and interviews, there appears to be a mutual acceptance of each other.

**CONCLUSION**

It is clear from both our place and person centered observations that public indoor centers have an important role to play which goes beyond providing a shopping and work environment. Many of the elderly in Complexe Des-

jardins were regular visitors who found the center offered a climate controlled, safe, lively environment in which to relax, people-watch, and meet friends. These are important city center functions which downtown "revitalization" projects must possess if they are to serve the broad interests of the community. On the other hand, this center has not lived up to the expectations of its retailers, while Place Ville Marie is considered a commercial success and its role as a convenient indoor passage linking downtown with the CN train station is generally applauded (Whyte, 1980). Its dearth of relaxation of facilities communicates non-verbally this business-oriented bias.

Our investigations indicate that the facilities provided influence the activities engaged in and the sex and companionship of clientele. Those persons most comfortable performing certain activities (e.g. men alone: sitting, reading) tend to be more strongly attracted to an environment facilitating that activity and, by their presence, subsequently influence the attractiveness of the environment for other groups. This was evident in the strong association between location, activities and clientele and reaffirmed by the interviews which distinguished between Place Ville Marie and Complexe Desjardins on the basis of their clientele rather than on facilities offered.

The possibility that facilities may attract "undesirable" clientele such as teenage loiterers and lead to conflicts between young and old, shoppers and people watchers, have inhibited the installation of public facilities in many centers and led to removal of seating, the locking of washrooms and so on, in others. But the design problem goes well beyond the provision of facilities and services. What is needed is an understanding of the intergroup and group-environmental dynamics involved. From this basis, design guidelines can be developed which strike a more appropriate balance between the interests of retailers and the community at large, and a plan produced which permits simultaneous use by a variety of clientele.

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### Correction to Volume 22:3/4, March 1983 issue

On page 93 of John Winter's article on "The Downtown and the Shopping Centre" there was a typesetting error. The second to last paragraph on that page should read as follows:

At the OMB hearing, public representatives supported their heritage and the small town concept, but were in favour of the proposed shopping centre. "The Board sensed that ...(this)... was an expression of the need for a first-line department store now, wherever the location."

# IN REVIEW / SOUS CRITIQUE



Delft about 1660, by Vermeer

## An international cross-section of heritage planning

*German Commission for UNESCO*

**Protection and cultural animation of monuments, sites and historic towns**

Bonn, UNESCO, 1980, 394 pages, soft cover, no price.

This publication has as its objective the guidance of nations and towns in their attempts to resolve the vast range of problems pertaining to both the preservation and renewal of older settlements. In addition, it aims at assisting and transmitting experiences of conservation policies as they obtain particularly to architectural ensembles and the protection of sites and monuments of historic significance.

A handsome report, it is the result of the actual launching of undertakings in the domain of preservation, at a variety of scales, in *Belgium* (Antwerp, Bruges), *Bulgaria* (Plovdiv), *Canada* (Vancouver's Gastown area), *France* (Arc-et-Senans, Manosque), *Federal Republic of Germany* (Celle, Ladenburg, Nuremberg, Regensburg), *Greece* (Athens-Plaka), *Hungary* (Eger, Holloko), *Italy* (Rome, Orvieto), *Netherlands*

(Dokkum, 's-Hertogenbosch, Leiden), *Poland* (Zamosc), *United Kingdom* (Faversham, Culzean Castle, Sissinghurst Castle), with a few observations on *Yugoslavia*.

The report is heavily illustrated with plans, maps, sketches, isometrics and photographs. Some contributing nations include bibliographic references and addresses of national organisations dealing in preservation.

The projects constituted spin-off from the 1975 European Cultural Heritage Year and aim both at presenting comprehensive surveys of the 'state-of-art' in the representative countries and evaluating some of the more critical problems and issues based on selected case studies communicated in the report.

Most important in this document for practicing planners is the manner in which the legal instruments available in the participating countries have been described and presented so as to enable comparisons, and this within the framework of local authority and governmental policies, including techniques and strategies of implementation.

The Canadian contribution includes an especially well written overview of legal, organisational and financial aspects of preservation in Canada, outlining the roles, programmes and activities of groups and institutions at Federal, Provincial and Local levels in the private, semi-public and public sectors of involvement.

This report should be of interest to consultants and public officials engaged in preservation efforts at the scale of individual structures as well as entire historic precincts. Although priorities, approaches and perspectives often vary between different nations, there is much to be learned from the cross-cultural knowledge this book offers.

As an international cross-section of experience, it is a significant reference for those concerned with real-world practice of heritage planning. It is a study which offers a glimpse of an irreplaceable heritage, embodied in the built environment, the symbolic result of human evolution over centuries.

*Prof. Norman Pressman*  
*School of Urban and*  
*Regional Planning*  
*University of Waterloo*

# Offers a well rounded introduction to gravity models but not the knowledge to work with them

David Foot

## **Operational Urban Models: An Introduction**

London, Methuen, 1981, 231 pages, \$16.95 Can. in paperback. Bibliography, author index, subject index.

What I have tried to do in this book is to stress the practical side of modeling by explaining in quite simple terms the different *types* of models, applying them to small actual regions and then describing numerous operational models to show how they have been applied....The audience is undergraduate students and practicing planners and urban analysts wishing to know about urban models as they are currently applied.

Foot has set himself an awkward task. He must describe the techniques used in creating urban land use development and transportation system models in elementary terms so that readers completely unfamiliar with them can grasp how they are used. At the same time he must show how the techniques are applied in state-of-the-art models. He makes the connection by means of highly simplified examples. This works quite well in illustrating the use of the techniques but is not convincing as an outline of the workings of real world operational urban models, for too much is missing. The effect is well illustrated by Chapter 6 which covers models based on linear regression analysis. Of its 36 pages, the first twenty explore simple and multiple regression analysis, then six pages describe (and this is done very well) a simplified application, a few pages are devoted to ancillary matters and six pages are used to survey the numerous variants of the large scale simultaneous linear equation models that have been developed. Obviously, scarcely anything of

significance can be said about them as operational models in such a short amount of space.

The book consists of eight chapters. Four are devoted to applications of the gravity model and kindred models, culminating in a description of the basic format of the Garin-Lowry Model. One chapter discusses linear regression based models and another models which utilize optimization methods based on linear programming techniques. The introduction provides a short history and categorization of models and the concluding chapter briefly addresses the utility of the models.

The treatment of the basic gravity model and its derivatives in a wide variety of applications is the most satisfactory feature of the book. Chapters two and three describe the basic model and illustrate its application in analyzing travel and retail location. Chapter four elaborates the model and integrates it with entropy maximizing methods (without delving into the mathematics of the latter) and chapter five combines it with a description of economic multipliers as a foundation for surveying the format of the Lowry model of urban development and spatial interaction. The least satisfactory feature of the book is the tentative manner in which the question of the usefulness of the models is handled in the last chapter. The user is given little guidance beyond being reminded that a model is an abstraction from reality and being told to pay attention to the practical questions that the modeling process is meant to address.

The author has a clear and lucid writing style but the book would benefit from more diagrams and a more careful proof reading – there are several minor, but irritating errors. The reader should also be warned about two other things. All the worked examples and data sources mentioned are taken from

the U.K. Also, despite the title, the book covers only particular aspects of particular types of urban models. The reader is offered the trip distribution model for home to work trips (the gravity model) but is not offered the forecasting, mode choice, route assignment and cost benefit analysis techniques that go to make up the full package of procedures required to analyze transportation options using such a model.

As an introductory text book *Operational Urban Models* assembles materials that are readily available elsewhere. The illustrative examples are well drawn but the summaries of operational models too brief to be of value beyond directing the reader to other sources. If the reader wants a well rounded introduction to the applications of the gravity model plus an inkling of what linear regression and linear programming based urban models are all about, this text is well worth considering. But the reader expecting to be able to work with operational models after mastering the content of this book will be disappointed, for it does not provide the necessary knowledge. There is no substitute for familiarization with an actual model and hands-on operation at a computer terminal. Finally, although the author makes no serious attempt to rebut the critics of urban modeling, the book does contain ample evidence of the progress made since Lee wrote his "Requiem for Large Scale Models" (JAIP, 39 pp. 163-178, 1973) a decade ago. The continual improvement in the cost-effectiveness of models stemming from improved data sources, tumbling computation costs and the growing library of model algorithms suggests that their role will not diminish and may grow spectacularly.

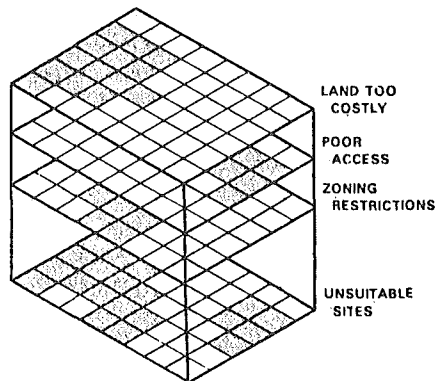
M.C. Poulton, Associate Professor  
Department of Urban and Rural  
Planning  
Technical University of Nova Scotia

Mark S. Monmonier

**Computer Assisted Cartography: Principles and Prospects**

Scarborough. Prentice-Hall  
Canada, 1982, 214 pages, \$26.20.

**An expert  
and a layman  
review  
a primer on  
mapping  
by computer**



**Catches up on the technology, its pitfalls and potentials**

Mark Monmonier, in this, his new book, has produced a valuable contribution to the library of any cartographer, planner, or planning department. Advances in the field of computer-assisted cartography have been, and continue to be, rapid. They have had, and will continue to have a significant influence on the cartographer and on the planner. Most are in the position of having to catch up on the technology, its pitfalls and

potentials, and evaluate how these changes might affect them.

Monmonier's book is readable and to the point. It avoids the trap of trying to explain everything about computers, but provides the necessary explanations. The use of the book is not over-powered by masses of either mathematical formulae or computer program listing, but enough of both are provided to

serve the purposes of both the author and most users.

The coverage of the field is brief, but thorough, with a good bibliography on some of the more technical aspects.

*E. Bert Piepgrass is President of Geographic Data Management, Calgary and former Manager of Corporate Systems, City of Calgary.*

**Well written for the layman**

All planners know that computers can be programmed to process and display data in map form, and probably all planners who have been at all close to such computer systems know that the practice of this art is not as simple, certain, flexible and automatic as one would like. There are three kinds of planners who need not read this book: those who will not consider adopting new tools in their own practice, those who will rush off to embrace the latest technological gee-wiz with messianic fervor, and those who are expert in computer graphics.

understate the prospects, at least for planners, leaving us to discover these by thinking about relationships between principles of his field and needs and opportunities in our own.

It is not always easy reading, but rarely does it seem unnecessarily difficult or obscure. Any planner with some interest and diligence should be able to comprehend the principles and technical terms presented. This should give a planner a basis for asking good questions of experts and

making realistic assessments of their answers. What more could we ask of a thin, comprehensible book on a rather technical subject?

The last 36 pages of bibliography, notes on sources of information about current technology and programs, glossary and index add to the value of a good book.

*H.C. Hightower,  
School of Community and Regional Planning,  
University of B.C., Vancouver*

*James D. McRae*

**The impact of exurbanite settlement on Rural Areas: A case study in the Ottawa-Montreal axis. Working Paper no. 22.**

Ottawa, Lands Directorate, Environment Canada, 1981, 89 pages.

Here are another couple of questionnaires on attitudes. Disappointing

because there is still no documentation on the network of farm support services, on how it alters with an influx of urban people and how that affects the farmers.

The most useful new material is contained (from two special runs on Stats Can) in Table 2.5 and Figure 2.8, recording land value changes.

*Mary Rawson  
Vancouver, B.C.*

One virtue of this book is that the title is accurate. It is about what computers can be programmed to do to assist people to make good, useful maps. It explains limitations and trade-offs in terms of why they are necessary. The principles which answer the 'why' questions appear, to this lay reviewer, to transcend the ever-changing array of new hardware and systems, and the hype that goes with them. Monmonier seems to

# Conservation to achieve sustainable development

*Peter Jacobs*

## **Environmental Strategy and Action: The Challenge of the World Conservation Strategy with reference to environmental planning and human settlements in Canada (Human Settlement Issues Series No. 6)**

Vancouver, University of British Columbia Press, 1981, 99 pages, \$6.95 in soft cover.

### **The International Strategy**

The World Conservation Strategy (WCS), a policy statement prepared by the International Union for the Conservation of Nature and Natural Resources in 1980, was an eye-opener. It told us that the combined destructive impacts of a poor majority struggling to stay alive and an affluent minority consuming most of the world's resources are undermining the very means by which all people on this planet can survive and flourish. This situation will continue to deteriorate until a new international economic order is achieved, a new environmental ethic is adopted, human populations stabilize, and sustainable development becomes the rule rather than the exception.

Sustainable development is the WCS focus. If current rates of land degradation continue, close to one third of the earth's arable land will be destroyed in the next 20 years, a period during which world population is expected to increase by almost a half. To be sustainable, development must be based on conservation of living resources and associated life-support systems, especially agricultural, forest, coastal and freshwater. Conservation and development become mutually reinforcing activities, not two opposing sides. The strategy explains the contribution of living resources to human survival, identifies priority issues,

and proposes ways of achieving sustainable development through conservation.

### **Planning Applications**

Although all of this has obvious relevance for Canada and for Canadian planners, it is difficult to make the connections in ways that allow the strategy to be applied to planning work and daily life. Peter Jacobs' book makes a modest contribution in that direction. The author, a professor of landscape architecture at the University of Montreal, draws on his extensive experience in various parts of the world and with international agencies. After introducing the North American context, he reviews three key issues from the WCS: maintenance of ecological processes, preservation of genetic diversity, and sustained utilization of renewable resources. Case examples are provided from Canada and contrasted with cases from other parts of the world. Environmental planning is then set out as a means to organize conservation for, rather than against development. Emphasis is on anticipatory planning which works towards a desired future state rather than on extrapolations of the present; such planning takes into account carrying capacity, environmental impacts, quality of life and other principles embodied in the WCS.

Concerned planners will find this discussion useful in translating the global strategy to a more meaningful level. Most will be intrigued by such statements as, "The task of conservation is not to resist development but to guide it, using the process and strategy referred to as environmental planning". Unfortunately, the book provides little more than tantalizing glimpses of what this could mean: ideas are presented briefly,

not followed through or tied together coherently. On the whole, eighty pages of text is hardly enough to provide the promised in-depth analysis of such a large subject; all that we get is a bare introduction.

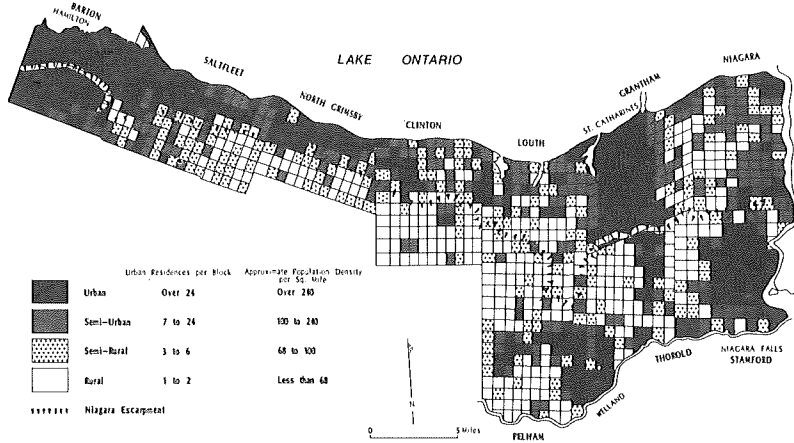
There is a deeper problem, reflected in the WC Strategy itself. This, and Jacob's book, seriously underplay politics, relying on the power of reasoned argument. Yet, a dominant feature of environmental problems, especially at the global scale, is that control over the required corrective and preventive action is often widely fragmented. That makes it tempting to respond with a call for a new international order (overlooking the dismal record of the UN) and with comprehensive strategies covering all aspects of the problem and its solutions (overlooking the fact that a solution is no solution until a way is found to implement it).

The World Conservation Strategy is an impressive step in the right direction, for its concept of sustainable development through conservation has wide applicability, right down to the local level. But it won't be applied simply through exhortation or incorporation in a plan. It will be applied when it reaches the next step where strategies are transformed into agreements hammered out among the parties involved who see it in their interest to pursue development *and* conservation. How to get to that stage, how to conduct the kinds of planning processes that will facilitate sustainable-development agreements, and how to link local action to global needs are the important questions. The answers still seem to be forthcoming.

*Reg Lang*

*Faculty of Environmental Studies,  
York University*

## DEGREE OF URBANIZATION IN NIAGARA FRUIT BELT, 1975



Prepared in the Environmental Studies Cartographic Centre, University of Waterloo

From Lands Directorate, Canada's Special Resource Lands

# A serious commitment needed to consider agricultural land in development planning

*J.D. McCuaig and E.W. Manning*  
**Agricultural Land Use Change in Canada: Process and Consequences, Land Use in Canada Series, Number 21**

Ottawa, Lands Directorate, Environment Canada, January 1982, 213 pages, free.

The urbanization of agricultural land has been both a perceived and real issue for planners in Canada for a long time. Environment Canada has attempted to analyze, on a

rational basis, changes in land use and then to look at a specific regional case study where processes of agricultural land-use change can be isolated.

The report provides historical background information, maps and statistical tables on agricultural land use change for 229 regions across the country, based upon census data from 1961 to 1976. The general, nationwide pattern of change is examined followed by discussion on the process of change and the regional case

study. Due to use of census data no later than 1976, the information presented is somewhat dated with respect to recent growth in the west. However, national trends are still relevant. Regional and provincial planners should find the material useful for considering factors affecting the use of rural land resources.

The case study presented is of a rural area of west-central Ontario not under the influence of any major urban centre. It would have been valuable to have another case study, for comparison, of an area under urban influence, in another part of the country.

The report's major conclusion is that freezing development on agricultural land is not the only answer to the problem. A serious commitment is necessary to consider agricultural land in development planning and to ensure that this land is not alienated where other alternatives exist.

It is regrettable that more detailed and specific planning solutions are not provided; however, the challenge is put forward to farmers, governments and planners to begin to seriously consider agricultural land as a needed resource for the future.

*Michael S. Manett*  
 Senior Planner, Long Range Planning Branch, City of Edmonton

## Grass-roots rural planning

*Elizabeth Redfield Marsh*  
**Cooperative Rural Planning: A Tug Hill Case Study**

Watertown, N.Y., Temporary State Commission on Tug Hill (State Office Building, Watertown N.Y., 13601), 1981, 147 pages.

In 1971 a resort developer took an option in the Tug Hill area, a "backwoods" rural area in northern New York State. Spurred by this and

reacting to the top-down planning process used by the Adironecks Commission, the local citizens decided to take control of their own future. This they did with some help from the State and some of its colleges.

*Cooperative Rural Planning* is a blow-by-blow account of that process, written by a social scientist who was herself peripherally involved in the process. As an account of grass-roots rural planning, extremely simply written and focussed on "people processes" and their significance for

planning, it is excellent. Any planner, far less any rural planner, concerned with achieving democratic action through citizen understanding should read this little study. The last three chapters, *Some lessons from Tug Hill, Evaluation and Conclusions* and *How to do it*, are especially valuable, as is the sympathetic but critical view of the non-planner author.

*J.W. Wilson*  
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# Philip Brown responds to Matthew Kiernan

Congratulations on Matthew Kiernan's thought-provoking article "Ideology and the Precarious Future of the Canadian Planning Profession" (*Plan Canada*: 22:1 March, 1982). Mr. Kiernan most eloquently expressed an argument that desperately needed introducing into our ongoing consideration of the future of our profession.

Mr. Kiernan argued that planning cannot be perceived to be an apolitical technical discipline, but must be recognized as essentially value-laden. In this, he might have reference to Karl Mannheim who, in *Ideology and Utopia*, argued that it is impossible to purge the emotional element from the rational, implying that the decision to strive for unemotional rationality in decision-making is itself a value-laden judgement. The concept of "rationality" can thus be seen as neither more nor less than another value – a value which may from time to time conflict with other values such as "social justice", "fairness", "freedom" or "compassion". Planners must recognize that their work is rooted in such fundamental principles as these and acknowledge the political nature of their profession. Zoning, for example, can be seen as protecting primarily the interests of the "little guy" from the actions of those with the money and influence to do much as they please if left unchecked. This is a value judgement,

but a necessary one if planners are to justify such regulatory tools against such free market concepts as "private zoning" (a system of privately negotiated voluntary deed restrictions between neighbouring landowners) which undoubtedly would work quite well for the economic elite, but which would fail to protect the interests of the less fortunate.

But while concurring with Mr. Kiernan's analysis, I was disappointed with some of his conclusions. Mr. Kiernan, I believe, has greatly underestimated the importance of "job security" as a motivating factor for the public sector planner, and has overestimated the acceptability of "positive discrimination" to those political masters to whom planners are ultimately responsible.

Some planners are indeed fortunate to work in jurisdictions where the politicians share Mr. Kiernan's concern for social justice. But these, I would suggest, are the exceptions rather than the rule.

In the interest of job security, but frequently quite unconsciously, planners tend to implicitly adopt as their own the value structures of their political masters. This is a natural part of group behaviour as employees are encouraged to internalize group goals, objectives and attitudes, with those that do not eventually falling by the wayside. Thus, all too often planners and politicians may differ on some of the superficial details but tend to be largely in agreement when it comes to their "world views". They may disagree on where a shopping centre should be located, but not on the principle of whether or not shopping centres are socially beneficial forms of development.

Significant differences in "world view" are likely to lead to an unstable and impermanent relationship between planner and politician. And I would contend that Mr. Kiernan's

reliance upon education to win politicians over to the concept of "positive discrimination" naively underestimates the entrenched power of privilege and self-interest in our society and places too much faith in the likelihood of politicians "seeing the light" once the appropriate information is systematically presented to them.

The implementation of "positive discrimination" must be preceded by public demands for increased social justice. Planners alone can do very little in terms of redressing social injustices unless they are backed up by popular political support. That is why I would suggest that planners must collectively start taking public stands on controversial issues of relevance to the planning profession. What we may not be able to say effectively as individual bureaucrats, we most certainly can say as a collective body of professionals. The planning profession, through its institute, should therefore speak out on such issues as the environmental effects of nuclear power generation, the impact of high interest rate policies on the social and physical well-being of the communities which we help to plan, the very real possibility of all our handiwork being destroyed by nuclear war – in short, on all matters of public concern that relate to the planning function.

I agree with Mr. Kiernan that planners must come to grips with the innate political nature of their profession and accept that their actions ultimately are value-laden. But I suggest that a professional institute which plays an active role in debating the important issues of our time would be a significant step towards nurturing a social conscience beneath the superficial rationality of the planning profession.

*Philip Brown, MCIP,  
Sudbury, Ont.*

# Nigel Richardson responds to Matthew Kiernan

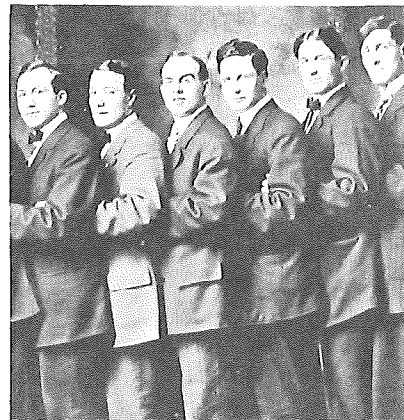
Though somewhat marred by a number of dubious assertions, inferences and arguments (not to mention the apparently inescapable pomposity of academic prose), Matthew Kiernan's thoughtful article in *Plan Canada* 22:1 raises important issues and deserves the serious attention of Canadian planners – but not their uncritical acceptance.

Let me try to summarise Kiernan's thesis, using his own words in part. He asserts that Canadian planners in general subscribe to two basic beliefs: that planning is a purely technical, rational, neutral, value-free activity; and that there is such a thing as a unitary "public interest" which is served by planning. "The confluence of the unitary public interest and rational/comprehensive ideologies", Kiernan claims, "has served to eviscerate Canadian planning of its political content and therefore its relevancy. Unless the depoliticizing effect of the two ideologies can be recognized and counteracted, Canadian planners will continue to be at best irrelevant and at worst detrimental to the most important processes of social change in this country."

If this plight is to be avoided, Kiernan argues, planners must accept, first, that "...planning in fact affords very few right and wrong answers, but instead answers which are entirely contingent on one's underlying political and philosophical values"; and second, that "...different groups have competing rather than congruent interests, and that, by definitive position on a given issue can only be satisfied at the expense of another's." But how, then, can the planner discover the "best" solution to a planning problem? Kiernan's answer is that "...it is not necessary for planners to synthesize *the* definitive position on a given issue. Indeed ... this is not possible; there

exist a multiplicity of politically-inspired positions which are irreconcilable. All that is necessary is for planners to acknowledge this and adopt one of them explicitly ... to abandon [the] misguided search for an illusory ideal and to content themselves with adopting a single coherent political outlook." But which outlook? "Given the existing unequal distribution of resources in contemporary society, and given the tendency of most planning interventions to either perpetuate or even exacerbate those inequalities, the planner's task seems clear ... the only moral course open to them is to throw in their lot with the disadvantaged ... [W]hat is being suggested here is essentially an extension of the logic of advocacy planning, but this time applied within the central planning bureaucracies themselves. This would unite the power of the bureaucracy with a predisposition to use it aggressively for the alleviation of socio-economic disparity."

Kiernan's major propositions seem to me to be incontrovertible: that planning is to a very large extent subjective and value-based, and that the concept of "the public interest" masks the reality of a wide range of particular, sectional interests. (However, this is not to say that the planning process is not *in part* rational and technical, nor that in specific cases a valid distinction cannot be made between "the public interest" and particular or private interests.) In alleging that the profession as a whole believes otherwise, I hope that Kiernan is erecting a straw man. My own observation does not support his charge, and I do not find his selection of Page – Lang data entirely convincing. If a planner is indeed not aware of these elementary but crucial truths on graduation, his school does not deserve CIP accreditation; if he is still not aware of them ten years later, either he is not



very bright, or he is very good at self-deception. If Kiernan's accusation is valid, then the profession is indeed in serious trouble.

However, whether or not this is the case, the problem Kiernan poses is real. If planning is in part subjective and if some inevitably benefit more than others (and some may even get hurt) as a result of planning decisions, how does the conscientious planner choose the "right" course? Kiernan's answer really falls into two parts. "[T]he planner's first task (and it is no small one) is to raise to the level of explicitness the question of who benefits and who loses from whatever planning proposal is under consideration." I fully agree; and I believe this to be the essence of the planner's role: to set out the various possible courses of action and the pros and cons of each – including the benefits to be gained and the disbenefits to be suffered by *all* affected parties. But I believe that the second part of Kiernan's prescription needs close examination: that since the deck is stacked against certain people anyway, the planner, having carried out his evaluation, should not embark on the fruitless pursuit of the chimaera of a "best" solution, but should deliberately advocate the course that is as far as possible in the interests of the "disadvantaged".

Here perhaps Kiernan only means to argue that the planning process should be used, openly and as a matter of policy, as a tool for the improvement of social conditions. If so, I agree again, though it is hardly a novel idea. But it could be inferred

# Matthew Kiernan replies

from his slightly ambiguous wording (and if it is not his intention, I apologise; but clarity here is extremely important) that he is advocating that planners should consciously, but not necessarily explicitly, bias their *policy* guidance in favour of courses deemed by them to help the "disadvantaged"; advocating, in reality, the usurpation of the decision-taking prerogatives of democratically elected politicians by planners-bureaucrats.

It is true, as Kiernan says, that "... it is not good enough for planners to abdicate responsibility altogether by hiding behind the comforting fiction that the politicians make all the final decisions... [P]lanners, by virtue of their near-monopoly on information and expertise, generally have a profound influence over the number and nature of the options placed before the politicians. Hence they must accept a substantial degree of responsibility for the results." But it is one thing for the planner to set out and evaluate as fully, fairly, and objectively as he can the available range of practical options, and *then* to express - with reasons - a personal recommendation. It is quite another to allow a deliberate bias, however well-intentioned, to colour his entire presentation of the case. This is nothing more than thinly-veiled, arrogant, fundamentally anti-democratic intellectual élitism.

This is not intended as an attack on Kiernan but as a warning to all planners with a sense of social mission (and that ought to include all of us) to remember their role as advisers, not decision-takers; and to recall that part of true professionalism lies in having both a personal and social philosophy, and the capacity and responsibility for reasonably objective, balanced analysis; but also in the ability to keep the two distinct. This does not mean suppressing the former; it means presenting one's personal views honestly as what they are, not introducing them surreptitiously in

While neither of your readers' letters is either unstintingly negative or unfair, there are a few points on which I must beg to demur. With respect to Mr. Brown's letter, whether my article reflected it or not, I am not totally unmoved by planners' understandable concern for job security. My sympathy, however, is not without its limits. In an extreme case of irreconcilable dissonance between a planner's ideology and that prevalent in his/her workplace, I would personally distinctly *prefer* unemployment or a different job (and even "profession") to complicity in work I regarded as fundamentally ethically bankrupt. But surely those are relatively extreme cases. My point, however, is really this: I am not at all satisfied that in that vast majority of less extreme cases, Canadian planners have been terribly vigorous about exploring the *limits* past which the articulation of a more redistributive ethic really does endanger their jobs. (For the sceptic, I do elaborate on this argument, with some empirical case material in an article entitled "The Fallacy of Planning Law Reform", cited in the *Plan Canada* article.) Secondly, while I would agree with Mr. Brown that to expect rhetoric alone to "convert" politicians to my perspective would indeed be the height of naivete, I don't believe I made that argument. Instead, what I did try to say was that, while the political education of both politicians and their electorate was an absolute *precondition* to the achievement of redistributive nirvana, it would by no means be suffi-

the manner of a thumb on the scales. And another part of professionalism for a planner is, of course, in Kiernan's words, "... the education of politicians through the systematic elucidation of who benefits and who loses from every planning proposal under consideration."

*Nigel H. Richardson, MCIP  
Toronto, Ont.*

cient by itself. I would, however, plead guilty to giving this latter point insufficient emphasis in the article, and am indebted to Mr. Brown for the criticism.

Nigel Richardson's thoughtful letter raises different issues, and here either I have not written sufficiently clearly or he has not read carefully enough. Mr. Richardson seems concerned (justifiably!) that in my intellectual arrogance I propose to usurp the democratic function of the politician. At no point in the article did I challenge (nor do I do so now) the politician's legitimate right to make final decisions on most planning matters. What I *did* say was that, in practice, in a multitude of policy areas including planning, politicians are abjectly dependent upon "technical" advice, and that planners have more influence than they often either admit or deserve. The task of my article then became suggesting *how* this influence ought in my view to be exercised. Where I really find Mr. Richardson's letter surprising, however, is in its vitriolic condemnation of the notion of allowing redistributive concerns to "colour his (the planner's) entire presentation of the case". I infer from the earlier portions of his letter that Mr. Richardson agrees with me both that:

- planners often currently "colour their entire presentation of the case" with a mystifying, obscurantist, pseudo-technocratic veneer.

- social redistribution is inherently defensible.

I am therefore puzzled to know why he objects to the substitution of a conscious and presumably socially defensible bias for an implicit and inequalitarian one. I am nonetheless flattered and grateful that both he and Mr. Brown found the article stimulating enough to warrant the time investment of a response.

*Matthew J. Kiernan  
Assistant General Manager  
Winnipeg Core Area Initiative*

## Letter

# The How Now, Downtown discussion helps measure if plans can achieve community objectives

Congratulations on the "How Now Downtown" discussion. Without necessarily agreeing with the evaluation criteria suggested by Wollenberg and McLaughlin or the critical comment put forward by Ted Droettboom, I think the commentaries are important because they provide planning practitioners with an additional means to assess the process by which downtown plans are formulated and, more important, to measure the extent to which plans (as opposed to other policies, regulations and initiatives) can be meaningful in the

achievement of what are considered to be community objectives.

I think that type of dialogue, somewhere between the newspaper reports found in Forum and the academic or scholarly-type articles usually contained in Plan Canada, is very appropriate for this publication and useful to the Profession. I hope we will see more of the same.

*Melvin S. Winch, MCIP  
Deputy Commissioner  
City of Saint John*

## Remerciements à nos recommandataires

Les lecteurs et la direction de Plan Canada éprouvent une vive reconnaissance à l'égard des recommandataires invisibles qui nous ont aidés l'année dernière.

**Peter Boothroyd  
Mario Carvalho  
Don Detomasi  
Iskandar Gabbour  
M.C. Ircha  
Dianne King**

**Robert W. McCabe  
Peter Martin  
Beth Milroy  
Mark Poirier  
Dimitri Procos**

**Richard Seaton  
Gordon Shanks  
Ray Spaxman  
Jay Wollenberg  
Brahm Wiesman  
Jeanne Wolfe**

## Thanks to Our Referees

Plan Canada's readers and editors owe a debt of gratitude to the invisible referees who served us during the past year.

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*Is it an intellectually sound contribution to the state of the art?*

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*Est-ce une contribution intellectuellement valable à l'état de la profession?*

*Est-ce écrit de façon à ce que les urbanistes y trouvent un apport pertinent?*

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