

Citizen Planner Training Collaborative

Advanced Tools and Techniques for Planning and Zoning

Fourteenth Annual Conference

Saturday, March 21, 2015

Hogan Conference Center

Holy Cross College, Worcester, MA

2015 Conference Schedule

8:00–8:45	Registration and continental breakfast					
8:45–9:15	Welcome and General Opening					
	Timely Topics				Nuts and Bolts for Effective and Efficient Boards	
Early-Morning Sessions 9:30–11:00	1. Design Review (MIIA) <i>Ken Buckland Lori Massa</i>	2. Climate Adaptation and Community Sustainability <i>Julie Conroy Wayne Feiden</i>	3. Mapping Your Community Using Simple Online Tools <i>Keith Ratner</i>	4. Get Ready—Gas Pipelines and Local Role in Permitting: Impacts/Zoning/Conservation <i>Gene Benson Beverly Woods</i>	5. Zoning Exemptions (MIIA) <i>Barbara Saint André Judi Barrett</i>	6. Roles & Responsibilities, Part 1 (MIIA) <i>Bob Mitchell Bob Ritchie</i>
Late-Morning Sessions 11:15–12:30	7. Establishing Local Historic Districts through Bylaws and Ordinances <i>Chris Skelly</i>	8. Are Your Solar Bylaws/Ordinances Current? <i>Kurt Gaertner</i>	9. The Value and Process of Housing Production Planning <i>Judi Barrett</i>	10. Coordinating Permit Reviews for Complex Projects (MIIA) <i>Gene Benson Ralph Willmer</i>	11. Special Permits & Variances (MIIA) <i>Barbara Saint André</i>	12. Roles & Responsibilities Part 2 (MIIA) <i>Bob Mitchell Bob Ritchie</i>
12:30–1:30	Lunch & Networking					
Afternoon Sessions 1:30–3:00	13. Manage A Successful RFP/RFQ Process <i>Ralph Willmer Alan Gordon</i>	14. Town-wide Planning Retreats for Master Plan Implementation <i>Angus Jennings Karen Cullen Christopher Glenn Hayes</i>	15. Inclusionary Zoning (MIIA) <i>Judi Barrett</i>	16. Planning with Community Support <i>Ezra Glenn</i>	17. Vested Rights and Nonconforming Uses & Structures (MIIA) <i>John J. Goldrosen</i>	18. Introduction to the Zoning Act (MIIA) <i>Carolyn Murray</i>

The conference will take place unless the State or City of Worcester is declared CLOSED as part of an official snow emergency: Tune to WCVB Channel 5, Worcester TV Channel 3, or WSRS Radio 96.1 or call for a taped message at (617) 287-5570.

Also refer to the CPTC website for cancellation information:

masscptc.org

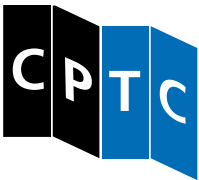
CPTC Conference Program!



MA Department of Housing
and Community Development
100 Cambridge Street
Suite 300
Boston, MA 02114



URBAN HARBORS INSTITUTE
UNIVERSITY OF MASSACHUSETTS BOSTON



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Our Sponsors:



Massachusetts Association of
Regional Planning Agencies



McGREGOR & ASSOCIATES
ATTORNEYS AT LAW, P.C.



American Planning Association
Massachusetts Chapter
Making Great Communities Happen

Get Credit for Taking CPTC Courses

You can get credit for taking many of the CPTC courses offered throughout the year, including the annual conference. Credit applies as follows:

CPTC Certificate Program

CPTC offers a Level One Certificate for completing three (3) courses.

Must complete:

1. The Roles and Responsibilities of Planning and Boards of Appeals, Part 1
2. The Roles and Responsibilities of Planning and Boards of Appeals, Part 2

Complete one (1) of the following:

3. Introduction to the Subdivision Control Act
4. Introduction to the Zoning Act
5. How to Write Reasonable and Defensible Decisions

CPTC offers a Level Two Certificate for completing Level One requirements and 3 of the following courses:

1. Planning with Community Support (applies to planning board members only)
2. Non-conforming Structures, Lots, and Uses, and Vested Rights
3. Zoning Exemptions
4. Special Permits and Variances

AICP Continuing Education Credit

Workshops designated (AICP) will be submitted to AICP for credit. If approved, these sessions will entitle the participant to 1.5 hours of credit. Additional information will be provided on our website and at the conference.

Massachusetts Interlocal Insurance Association (MIIA) Rewards Program

Sessions designated (MIIA) entitle your town to credit under the MIIA Rewards Program towards public officials liability insurance.



Registration Form

Absolute Deadline for receiving registrations is: FRIDAY, MARCH 13, 2015!

We cannot accept last-minute registrations. You can register online at masscptc.org until the deadline.

Town checks may be sent by separate mail and arrive later than the deadline if necessary.

Name: _____ Board affiliation (planning, zoning, etc.): _____

Street address: _____

City: _____ State: _____ Zip: _____

Daytime phone number: _____ E-mail: _____

City/town served (you must fill this in to get course credit): _____

I want to attend the following sessions:

Mark one conference session per time slot (✓). Please keep a copy of this page for your records—we do not confirm registrations.

9:30 a.m.–11:00 a.m.

- 1. Design Review
- 2. Climate Adaptation
- 3. Mapping Your Community
- 4. Get Ready—Gas Pipelines
- 5. Zoning Exemptions
- 6. Roles and Responsibilities 1

11:15 a.m.–12:30 p.m.

- 7. Establishing Historic Districts
- 8. Solar Bylaws/Ordinances
- 9. Value of Housing Planning
- 10. Coordinating Permit Reviews
- 11. Special Permits & Variances
- 12. Roles and Responsibilities 2

1:30 p.m.–3:00 p.m.

- 13. Successful RFP/RFQ Process
- 14. Town-Wide Master Plan
- 15. Inclusionary Zoning
- 16. Planning w/Community Support
- 17. Vested Rights & Nonconforming
- 18. Introduction to the Zoning Act

Registration fee: \$65 per person. (Receipts will be provided at registration. We do not confirm registrations.)

Please make check payable to CPTC and mail or fax this form by Friday, March 13, 2015 to:

CPTC, c/o Urban Harbors Institute, UMass Boston, 100 Morrissey Boulevard, Boston, MA 02125 or Fax to (617) 287-5575.

Online registration is available at masscptc.org. You may not register by E-mail.

QUESTIONS? Please contact CPTC Coordinator Dennis Leigh at (617) 287-5570 or Elaine Wijnja at DHCD at (617) 573-1360

Directions to Holy Cross College: From Route 290 in Worcester, take Exit 11 (College Square). Immediately cross over to the far right lane and take the first right before the traffic light onto College Street. Go up the hill and turn left into the last gate (number 7). The Hogan Center is the second building on the left.

Program

8:00 a.m.–8:45 a.m.

Registration and continental breakfast

8:45 a.m.–9:15 a.m.

Welcome and General Opening

9:30 a.m.–11:00 a.m. Early Morning Sessions

1. Design Review (MIIA)(AICP)

This session will review the criteria and methods of project design reviews. The session leaders will present attendees with a review of the legal basis and justification for design review, a definition of design standards and guidelines, and then present the ways these criteria are written and how they may be applied. The session will continue with a few examples of communities that have implemented design review and what their experiences have been. The attendees will then be invited to participate in a typical design review with actual plans.

Speakers: Ken Buckland, AICP LEED AP, Principal, The Cecil Group; Lori Massa, AICP, Senior Planner, City of Somerville

Moderator: Kathy Joubert, Town of Northborough, CPTC Board

2. Climate Adaptation and Community Sustainability (AICP)

Climate, resiliency, mitigation and community sustainability are being discussed in almost every community, but sometimes the discussion doesn't go beyond, "We should be doing something about this!" or, "Let's apply for hazard mitigation or energy grants." Planners need to think creatively and about repurposing planning policies and tools already at their disposal. We will discuss what investment, policy, regulatory and other strategies are being developed and implemented in Massachusetts at all levels. We hope to engage participants to share and take ideas home to their own communities.

Speakers: Julie Conroy, AICP, Senior Environmental Planner, Metropolitan Area Planning Council; Wayne Feiden, FAICP, Director of Planning and Sustainability, City of Northampton

Moderator: E. Heidi Ricci, Senior Policy Analyst, Mass Audubon

3. Mapping Your Community Using Simple Online Tools (AICP)

This workshop will help planners learn to create both interactive web maps and static paper/PDF maps. Whether the need is to map batches of addresses, make better presentation graphics or evaluate demographic and land use trends, online mapping and GIS tools are now readily available and simple to use. The workshop will begin by examining some of the basics of mapmaking including scale, projection and cartographic design. It will then review examples of easily accessible map data sources including the U.S. Census Bureau, the state of Massachusetts and Google. Lastly, examples made from online mapping tools including Google Maps, American Factfinder, Social Explorer and Mango Maps GIS will be presented.

Speaker: Dr. Keith A. Ratner, Professor, Salem State University

Moderator: Jack Wiggin, FAICP, Director, Urban Harbors Institute, UMass Boston

4. Get Ready—Gas Pipelines and Local Role in Permitting: Impacts/Zoning/Conservation (AICP)

Several natural gas pipeline expansion projects have been proposed in Massachusetts. Local officials need to understand how the permitting process works through the Federal Energy Regulatory Commission (FERC), and how they and their constituents can provide input. This session will provide an overview of the FERC authority and permitting process and will help to clarify what extent local bylaws and regulations may be considered, both during the permitting process and over the life of a pipeline.

Speakers: Eugene Benson, Executive Director, Massachusetts Association of Conservation Commissions; Beverly Woods, Executive Director, Northern Middlesex Council of Government

Moderator: Alan Pease, Town of Ashby Planning Board, CPTC Treasurer

5. Zoning Exemptions (MIIA)

The Zoning Act provides certain exemptions for agricultural, educational, childcare and religious uses. Certain state and federal land and uses are also exempted from local zoning regulations. This session explains these exemptions and the circumstances under which municipalities can enact and impose regulations.

Speakers: Barbara Saint André, Attorney, Petrini & Associates, P.C.; Judi Barrett, Director of Municipal Planning, RKG Associates, Inc.

Moderator: Bruce Hughes, Old Colony Planning Council, CPTC Board

6. Roles and Responsibilities, Part 1 (MIIA)

Join us if you are a new Planning Board or ZBA member or building inspector. This program will launch you into your role as a local official and introduce you to the functions of the boards and the main tools of planning and zoning. This session is presented in two parts in order to be able to present the large amount of information and to provide time for questions and answers. We encourage you to sign up for Part 1 and Part 2.

Speakers: Bob Mitchell, FAICP, Robert P. Mitchell & Associates; Bob Ritchie, Attorney

11:00 a.m.–11:15 a.m. Break

11:15 a.m.–12:30 p.m. Late Morning Sessions

7. Establishing Local Historic Districts through Bylaws and Ordinances (AICP)

Local historic districts offer the best method for halting demolitions, reviewing new construction and protecting community character within our downtowns, villages and neighborhoods. Since the 1950s, over 120 cities and towns in Massachusetts have established at least one local historic district. In this session, we will cover how local historic districts are established under state law, the variety of local historic districts statewide, the benefits of local historic districts, and common areas of confusion. Most proposed local historic districts do not make it to town meeting. We'll discuss why that is and answer many other questions such as, "Can you really establish a single building local historic district?"

Speaker: Christopher C. Skelly, Director of Local Government Programs, Massachusetts Historical Commission

Moderator: Bruce Hughes, Old Colony Planning Council, CPTC Board

Program

8. Are Your Solar Bylaws Current? (AICP)

This session will provide an overview of the model bylaws created by the state for solar photovoltaic installations and discuss their implementation. It will also address solar siting concerns and potential solutions at the state and local levels.

Speaker: Kurt Gaertner, AICP, Massachusetts Executive Office of Energy and Environmental Affairs

Moderator: Michael DiPasquale, AIA, Extension Assistant Professor, UMass Amherst Department of Landscape Architecture and Regional Planning

9. The Value and Process of Housing Production Planning (AICP)

This workshop will address the process of developing a local housing plan—including, but not limited to, a “Housing Production Plan” as defined in the state’s Chapter 40B regulations—and the value of the process and the plan. Some communities do not have a housing plan or have not done much housing planning except in response to a particular housing proposal. The session will show how to quantify and evaluate a community’s existing housing, show how to measure affordability and to examine the suitability of existing housing for a variety of household types, explain how to establish realistic goals and objectives, and explore a menu of strategies to accomplish the community’s goals.

Speaker: Judi Barrett, Director of Municipal Planning, RKG Associates, Inc.

Moderator: Kathy Joubert, Town of Northborough, CPTC Board

10. Coordinating Permit Reviews for Complex Projects (MIIA)(AICP)

When project proposals for local permits come before your city/town boards, how does your city or town deal with multiple reviews? How do you handle the sequencing and coordination between the boards charged with issuing the permits? Does this process frequently result in a game of ping-pong between the boards? Join us for a discussion of best practices designed to create a more predictable process for both the municipality and the project applicant.

Speakers: Eugene Benson, Executive Director, MA Association of Conservation Commissions; Ralph Willmer FAICP, Senior Planner, Vanasse Hangen Brustlin, Inc.

Moderator: Jack Wiggin, FAICP, Director, Urban Harbors Institute, UMass Boston

11. Special Permits and Variances (MIIA)

Are you clear about the difference in purpose and process between special permits and variances? Learn about the key issues and complex criteria for making sound decisions. The session discusses important procedural requirements necessary to avoid constructive approval and the importance of meeting timelines.

Speaker: Barbara Saint André, Attorney, Petrini & Associates, P.C.

Moderator: Alan Pease, Town of Ashby Planning Board, CPTC Treasurer

The CPTC Board of Directors dedicates this year’s Annual Conference to the memories of

Rob Hubbard, Town of Gardner and Steve Costello, Town of Norwood.

Rob’s and Steve’s contributions to the planning field will be sorely missed.

12. Roles and Responsibilities, Part 2 (MIIA)

Part 2 of this important and popular topic will be a discussion of the three legs of “good government.” It will focus on the open meeting, public records and conflict of interest laws.

Speakers: Bob Mitchell, FAICP, Robert P. Mitchell & Associates; Bob Ritchie, Attorney

12:30 p.m.–1:30 p.m. Lunch

1:30 p.m.–3:00 p.m. Afternoon Sessions

13. Manage a Successful RFP/RFQ Process (AICP)

Learn how to oversee the process of hiring a consultant for planning services. Find out how to write a request for proposal/request for qualifications, how to conduct the selection and interview process, how to deal with the contract between the consultant and municipality and how to monitor the work. Sample documents will be provided and attendees are encouraged to discuss particular issues and questions they have faced when dealing with consultant services.

Speakers: Ralph Willmer FAICP, Senior Planner, Vanasse Hangen Brustlin, Inc; Alan Gordon AICP, Town Planner, Town of Charlton

Moderator: Phil DeMartino, Technical Assistance Program Coordinator, MA Department of Housing & Community Development

14. Town-wide Planning Retreats as a Framework for Master Plan Implementation (AICP)

Town-wide comprehensive planning can be effective at setting out a shared community vision, but identifying specific implementation items and building them into a work plan can be a challenge amid competing priorities. This session will describe innovative models for town-wide community forums organized (in Westford) around master plan implementation and (in Ware) around town-wide zoning amendments. Session speakers were recognized with APA-MA Awards for their work on these innovative, practical approaches to community engagement and coordination among town boards, committees and departments. This session will describe the approach and how it can be applied in other communities.

Speakers: Angus Jennings, AICP, Consultant, A.G. Jennings, LLC; Karen Cullen, AICP, Director of Planning & Community Development, Town of Ware; Christopher Glenn Hayes, Consultant

Moderator: Michael DiPasquale, AIA, Extension Assistant Professor, UMass Amherst Department of Landscape Architecture and Regional Planning

15. Inclusionary Zoning (MIIA)(AICP)

This workshop will explore the concept of inclusionary zoning or zoning that encourages or requires the inclusion of affordable housing in residential or mixed-use developments. The program will cover planning, social and legal considerations; ways to make inclusionary zoning an effective tool for affordable housing development; issues and problems with inclusionary zoning; public education strategies and opportunities to make inclusionary zoning realistic for developers.

Speaker: Judi Barrett, Director of Municipal Planning, RKG Associates, Inc.

Program

16. Planning with Community Support (AICP)

The course describes ways to structure a planning process—whether for a comprehensive/master plan or something else—that will increase your chances of gaining support of the community through the passage and implementation process. Also covered are techniques for working with (or without) consultants.

Speaker: *Ezra Glenn, AICP, Lecturer in Community Development, Massachusetts Institute of Technology*

17. Vested Rights and Nonconforming Uses and Structures (MIIA)

This session clarifies the difference between a nonconforming structure, lot and use. It explains the difference between a nonconforming and a noncompliant structure, familiarizes board members with issues regarding alterations to nonconforming structures or uses and describes separate and common protection as well as vested rights for subdivision and ANR plans.

Speaker: *John J. Goldrosen, Attorney, Kopelman and Paige PC*

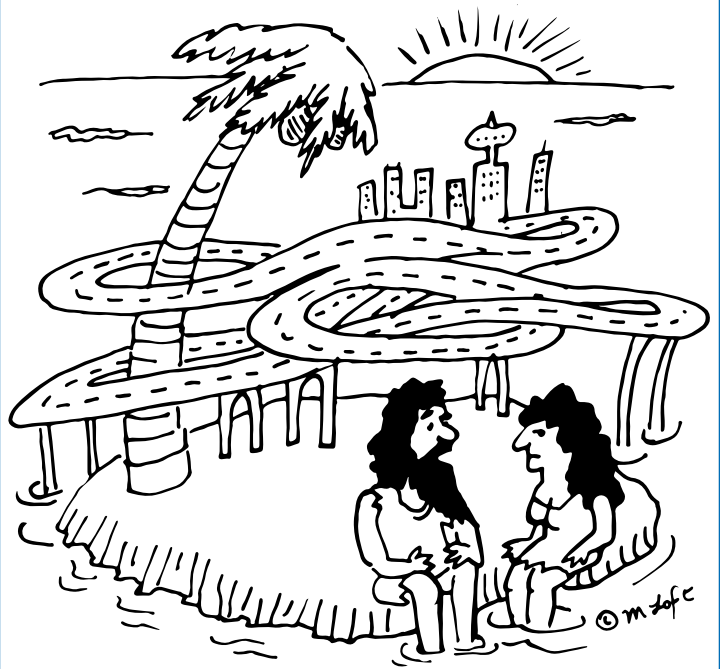
Moderator: *Alan Pease, Town of Ashby Planning Board, CPTC Treasurer*

18. Introduction to the Zoning Act (MIIA)

For newer board members, this course addresses the history and purposes of zoning; the adoption of zoning bylaws, variances and special permits; the requirements of public hearings and voting and other key procedural requirements.

Speaker: *Carolyn M. Murray, Attorney, Kopelman and Paige, P.C.*

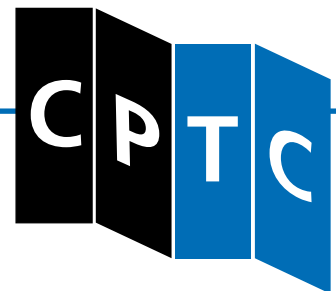
Moderator: *Kathy Joubert, Town of Northborough, CPTC Board*



Who Should Attend?

Planning, zoning, building, conservation officials
Citizens interested in land-use and development issues in their communities
Municipal staff members who serve Boards and planning departments
Professional planners, and others who consult with municipal Boards

Cost: Conference attendance costs \$65 and includes buffet lunch. Payment is due with registration (see form) or may be paid using PayPal on the CPTC website. Town checks may be sent separately and may arrive after the deadline.



Questions? masscptc.org or Dennis Leigh, (617) 287-5570 or Elaine Wijnja, (617) 573-1360

The Citizen Planner Training Collaborative is a cooperative program of UMass Extension, the Massachusetts Department of Housing and Community Development, the Massachusetts Chapter of the American Planning Association, the Massachusetts Association of Regional Planning Agencies and the Massachusetts Association of Planning Directors.

UMass Extension is an equal opportunity provider and employer, United States Department of Agriculture cooperating. Contact your local Extension office for information on disability accommodations.

Contact the State Extension Director's Office if you have concerns related to discrimination, (413) 545-4800 or see ag.umass.edu/civil-rights-information/civil-rights-information-resources.