

Citizen Planner Training Collaborative

Advanced Tools and Techniques for Planning and Zoning

Nineteenth Annual Conference
 Saturday, March 21, 2020
 Hogan Conference Center
 Holy Cross College, Worcester, MA



2020 Conference Schedule

8:00-8:30	Registration and Continental Breakfast					
8:30-9:00	General Opening/Welcome and Speaker: Smart Growth Alliance—Equity in Planning					
	Nuts and Bolts for Effective and Efficient Boards			Timely Topics		
Early Morning Sessions 9:15-10:45	1. Roles & Responsibilities of Planning and Zoning Boards of Appeals <i>Bob Mitchell</i>	2. Introduction to the Subdivision Control Law and ANR <i>Barbara J. Saint André</i>	3. Form-Based Code for Small Towns <i>Christopher Ryan</i> <i>Neil Pade</i> <i>Alan Manoiian</i> <i>Maren Toohill</i>	4. Retaining Local Control over Wireless Facilities Siting <i>Andrew Afflerbach</i> <i>Alan Mandl</i>	5. Resilient Lands: Nature's Value in a Changing Climate <i>Bob O'Connor</i> <i>E. Heidi Ricci</i>	6. Planning Ahead for Rural Massachusetts <i>Linda Dunlavy</i> <i>Jeanne LeClair</i>
Late Morning Sessions 11:00-12:30	7. Introduction to the Zoning Act <i>Carolyn M. Murray</i>	8. Drafting Zoning Amendments <i>Adam J. Costa</i>	9. Zoning Pitfalls and Pratfalls: What NOT to do! <i>Barbara J. Saint André</i> <i>Judi Barrett</i>	10. Traffic and Planning Boards: Addressing Resident Concerns <i>Joseph Scardino</i> <i>Noreen O'Toole</i> <i>Jeffrey S. Dirk</i>	11. Is Your Community a MVP? Planning/Action for Resilience <i>Kara Runsten</i> <i>Alexandra Vecchio</i> <i>Jillian Wilson-Martin</i>	12. Adaptive Re-use of Buildings Using Historic Tax Credits <i>Katie Day</i> <i>Brian Lever</i> <i>George Vasvatekis</i>
12:30-1:45	Lunch and Networking					
Afternoon Sessions 1:45-3:15	13. Planning with Community Support <i>Brian Currie</i>	14. Vested Rights and Nonconforming Uses and Structures <i>Ilana Quirk</i>	15. Data 101: Where to get it, how to use it, and effective ways to message it <i>Lily Perkins-High</i> <i>Callie Clark</i>	16. Inclusionary Zoning, and Zoning that is <i>Actual-ly</i> Inclusive <i>Katharine Lacy</i> <i>Judi Barrett</i>	17. How to Use Peer Reviews Effectively <i>Leonardi Aray</i> <i>Gerry Preble</i> <i>Kristina Johnson</i> <i>Gigi Munden</i>	18. The Process of Repurposing a Shopping Mall <i>Robert Pellegrini</i> , <i>Matt Mrva</i> , <i>Arnold Robinson</i> , <i>Daniel LaFrance</i> , <i>Paul Cincotta</i> , <i>Jamie Kelleher</i>

Get Credit for Taking CPTC Courses

You can receive credit for taking many of the CPTC courses offered throughout the year, including at the Annual Conference.

CPTC CERTIFICATE PROGRAM:

CPTC offers a Level One Certificate for completing 3 courses.

Must complete:

1. Roles & Responsibilities of Planning and Zoning Boards and complete two of the following:
3. Introduction to the Subdivision Control Law and ANR
4. Introduction to the Zoning Act
5. Writing 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
2. Vested Rights and Nonconforming Structures and Uses
3. Zoning Exemptions
4. Special Permits and Variances

AICP CM Credit: Workshops designated CM I 1.5



Certification Maintenance

AICP members can earn 1.5 Certification Maintenance (CM) credits for each designated workshop. A total of 4.5 CM credits per person are available at this conference. More information about AICP's CM program can be found at www.planning.org/cm

Massachusetts Interlocal Insurance Association (MIIA) Rewards Program

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



Registration Form

Deadline to receive mail-in registration and to register online at www.masscptc.org is **Monday, March 16, 2020**

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 code: _____

Daytime phone number: _____ Email: _____

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

I want to attend the following sessions:

Mark one session per time slot. You will receive an automated registration confirmation email once your information is received.

9:15 a.m. - 10:45 a.m.

- 1. Roles and Responsibilities
- 2. Intro to Subdivision Control & ANR
- 3. Form-Based Code for Small Towns
- 4. Wireless Facilities Siting
- 5. Resilient Lands: Nature's Value
- 6. Planning Ahead for Rural MA

11:00 a.m. - 12:30 p.m.

- 7. Introduction to the Zoning Act
- 8. Drafting Zoning Amendments
- 9. Zoning Pitfalls and Pratfalls
- 10. Traffic & Planning Boards
- 11. Is Your Community a MVP?
- 12. Adaptive Reuse of Buildings

1:45 p.m. - 3:15 p.m.

- 13. Planning with Community Support
- 14. Vested Rights & Nonconforming
- 15. Data 101
- 16. Inclusionary Zoning
- 17. How to Use Peer Reviews
- 18. Repurposing a Shopping Mall

Registration fee: \$75 per person. Registering for the conference is a commitment to attend. Payment is due if you do not cancel your registration by Monday, March 16, 2020.

Please make check payable to CPTC/ APA-MA and mail this form to be received by Monday, March 16, 2020 to:

CPTC/ APA-MA, c/o Urban Harbors Institute, UMass Boston, 100 Morrissey Boulevard, Boston, MA 02125

Cancellations: Payment is required unless a written cancellation request is received by the CPTC Coordinator by Monday, March 16, 2020 at coordinator@masscptc.org. No refunds will be processed after this date.

Questions? Please contact Coordinator Allison Novelly at 617-287-5570 or Elaine Wijnja at DHCD at 617-573-1360

Conference Program

8:00 a.m. – 8:30 a.m.

Registration and Continental Breakfast

8:30 a.m. – 9:00 a.m.

Welcome and Speaker: Smart Growth Alliance—Equity In Planning

9:15 a.m. – 10:45 a.m. Early Morning Sessions

1. Roles and Responsibilities of Planning Boards and Zoning Boards of Appeals (MIIA, CPTC)

Join us if you are a new Planning Board member or building inspector. This program will launch you into your role as a local official and introduce you to the functions of the two boards and the main tools of planning and zoning. This session will also include an introductory discussion of the Open Meeting, Public Records, and the Conflict of Interest Laws.

Speakers: *Bob Mitchell, FAICP, Planning Consultant*

2. Introduction to Subdivision Control Law & ANR (MIIA, CPTC)

This session addresses the purposes of the Subdivision Control Law and the Planning Board's authority under the Act. It also covers important procedural requirements and board responsibilities when reviewing subdivision and ANR plans; adoption of subdivision regulations; review of ANR plans; access issues; preliminary and definitive plans; Planning Board waivers; modifying, amending and rescinding plans; enforcement; vested rights; and zoning freezes.

Speaker: *Barbara Saint André, Attorney, Town of Medway*

Moderator: *Ralph Willmer, FAICP, Technical Assistance Program Manager and Principal Planner, Metropolitan Area Planning Council, CPTC Chair*

3. Form-Based Code for Small Towns: Developing and Adopting a Form-Based Code System **CM | 1.5**

The Form-Based code has been a popular alternative for new development or urbanized areas, particularly for larger communities. In this session, the panel will define FBC and describe the benefits and challenges of form-based codes as they may apply to smaller communities. We will also describe the steps that such communities can take to successfully implement a form-based code system.

Speakers: *Christopher Ryan, AICP, Ph.D., Director of Community and Economic Development, Town of Harvard; Neil Pade, AICP, Director of Planning and Community Development, Town of Canton, CT; Alan Manoian, AICP, Director of Community & Economic Development, Town of Ayer; Maren Toohill, AICP, Town Planner, Town of Littleton, CPTC Board member*

Moderator: *Maren Toohill, AICP, Town Planner, Town of Littleton, CPTC Board member*

4. Retaining Local Control Over Wireless Facilities Siting **CM | 1.5**

Municipalities and municipal utilities across Massachusetts are being inundated with requests for siting of wireless facilities including larger "macro" facilities and, increasingly, small wireless facilities or "small cells." While the first wave has focused on built-up areas, the wireless industry is now seeking to expand to residential neighborhoods and smaller communities. Meeting the growing demand for mobile data will require installation of millions of new small cells across the na-

tion, and the recent emergence of the 5G standard will only accelerate this growth. Federal limits on local control over the permitting of wireless communications facilities have recently been extended and modified through the FCC's Small Wireless Facilities order to apply to wireless facilities attached to utility poles, municipal streetlights, and existing wires located in the public ways. As a result, municipalities and municipal utilities must accommodate the wireless industry in their buildout. This panel will review federal constraints on local permitting authority and describe the relevant technologies and their implications. It will also offer strategies in addressing legal, technical, and aesthetic permitting challenges and cover zoning and grant of location practices and standards needed to maximize municipal control over wireless siting.

Speakers: *Andrew Afflerbach, Ph.D., P.E., CEO and Chief Technology Officer, CTC Technology & Energy; Alan Mandl, Esq., Of Counsel, Ferriter, Scobbo & Rodophele, PC*

Moderator: *Katharine Lacy, AICP, Senior Planner, Massachusetts Housing Partnership, CPTC Board member*

5. Resilient Lands: Nature's Value in a Changing Climate **CM | 1.5**

Land conservation plays important roles in climate mitigation and resilience for people and nature. This workshop will present the latest status and trends in land use, from Mass Audubon's 6th edition Losing Ground report, along with an overview of the Resilient Lands Initiative to develop and implement a new Statewide Land Conservation Plan. This process involves a diversity of stakeholders for eight key "land values" including habitat, forest and farms, urban open space and public health, outdoor recreation, water supply and watersheds, economic stability and protection from climate impacts. Conserved land reduces impacts such as heat islands, flooding and water supply threats while connecting habitats, helping farmland be more resilient and diverse, and improving forest resilience. Information on ecosystem services will be provided, and we will gather input and ideas from participants for the Resilient Lands Initiative.

Speakers: *Bob O'Connor, Director of Conservation Services, Executive Office of Energy and Environmental Affairs; E. Heidi Ricci, Assistant Director of Advocacy, Mass Audubon, Shaping the Future of Your Community Program, CPTC Board member*

Moderator: *E. Heidi Ricci, Assistant Director of Advocacy, Mass Audubon, Shaping the Future of Your Community Program, CPTC Board member*

6. Planning Ahead for Rural Massachusetts **CM | 1.5**

Massachusetts' 170 rural communities, which comprise 59% of the state's land area and only 13% of the total population, face different challenges than the rest of the Commonwealth. This session will provide an overview of the findings and recommendations of the recently issued Rural Policy Plan. This session will also discuss strategies that small towns have taken to attract new young families, visitors, and small businesses to stay economically relevant and financially sustainable.

Speakers: *Linda Dunlavy, Executive Director, Franklin Regional Council of Governments, Chair of the State Rural Policy Advisory Commission; Jeanne LeClair, Economic Development Director, Gateway Hilltowns*

Moderator: *Michael DiPasquale, AICP AIA, Extension Assistant Professor, University of Massachusetts-Amherst, CPTC Board member*

11:00 a.m. – 12:30 p.m. Late Morning Sessions

7. Introduction to the Zoning Act (MIIA, CPTC)

This course addresses the purposes of the Zoning Act and the process (and the Planning Board's role) for the adoption/amending of zoning bylaws and ordinances. The difference between variances and special permits will be discussed. Additionally, the course will include how zoning is enforced and by whom as well as the role of the Zoning Board of Appeals in variances and zoning appeals.

Speaker: Carolyn M. Murray, Attorney, KP Law P.C.

Moderator: Alan Pease, Ashby Planning Board, CPTC Treasurer

8. Drafting Zoning Amendments (MIIA) CM | 1.5

While regular review and amendment of a municipality's zoning ordinance or bylaw in response to changing needs and circumstances is essential to ensuring that it remain up-to date, the process can be tricky. This course will provide a step-by-step roadmap on how to adopt and amend zoning codes in accordance with the strict requirements of G.L. 40A Section 5. Participants will learn the type and scope of permissible amendments, the relationship between zoning and other municipal planning documents, and the essential role of the Planning Board. Tips for drafting zoning amendments, and strategies for successfully getting them passed will also be addressed.

Speaker: Adam J. Costa, Attorney, Mead, Talerman & Costa, LLC

9. Zoning Pitfalls and Pratfalls: What NOT to do! CM | 1.5

Drafting zoning by-laws and ordinances for your community is becoming ever more complicated; in addition to legal issues, many zoning regulations suffer from practical and wordsmithing woes. What mine fields should you avoid? We will review common pitfalls to avoid, and share stories of some of our zoning pratfalls over the years.

Speakers: Barbara J. Saint André, Director, Community and Economic Development, Town of Medway; Judi Barrett, Principal, Barrett Planning Group LLC

Moderator: Ralph Willmer, FAICP, Technical Assistance Program Manager and Principal Planner, Metropolitan Area Planning Council, CPTC Chair

10. Traffic and Planning Boards: Addressing Resident Concerns About New Development and Increasing Traffic (MIIA)

The general purpose of a Planning Board is to provide for and guide a community's orderly growth and development. With development and changes in land use patterns comes increasing burdens on the community infrastructure, the most apparent of which is increased traffic. This session will discuss the role of the Planning Board in project review, the public hearing process, submission requirements for Transportation Impact Assessments, peer review and community input, and mitigation of impacts.

Speakers: Joseph Scardino, Chair, Stoughton Planning Board; Noreen O'Toole, Retired Stoughton Town Planner; Jeffrey S. Dirk, P.E., PTOE, FITE, Partner, Vanasse & Associates, Inc.

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

11. Is Your Community a MPV? Planning and Action for Resilience CM | 1.5

The Municipal Vulnerability Preparedness (MVP) program provides support to Massachusetts municipalities to plan for climate change resiliency and implement priority projects. Funding is provided to complete vulnerability assessments, develop action-oriented plans, and grants for implementation projects. Massachusetts is the first state to complete a Statewide Hazard Mitigation and Climate Adaptation Plan (SHMCAP) involving all agencies. Learn about the MVP

program, local funded projects, and community benefits.

Speakers: Kara Runsten, Municipal Vulnerability Preparedness Manager, Massachusetts Executive Office of Energy and Environmental Affairs; Alexandra Vecchio, Climate Change Program Director, Mass Audubon; Jillian Wilson-Martin, Sustainability Coordinator, Natick

Moderator: E. Heidi Ricci, Assistant Director of Advocacy, Mass Audubon, Shaping the Future of Your Community Program, CPTC Board member

12. Adaptive Reuse of Buildings Using Historic Tax Credits CM | 1.5

Historic rehabilitation tax credits can play a significant role in the financial success of a historic renovation project. This session will explore the use and syndication of historic tax credits. Hear from the primary players involved in successful projects, including a developer, lawyer, and historic preservation consultant. Panelists will provide guidance and insight into the successful use of such credits.

Speakers: Katie Day, Klein Hornig, LLP; Brian Lever, Preservation Planner, Epsilon Associates, Inc; George Vasvatekis, Managing Partner, 1620 Capital LLC

Moderator: Doug Kelleher, Principal, Epsilon Associates, Inc.

12:30 p.m. – 1:45 p.m. Lunch and Networking

1:45 p.m. – 3:15 p.m. Afternoon Sessions

13. Planning with Community Support (MIIA, CPTC) CM | 1.5

The course describes how to conduct a planning process, with an emphasis on a comprehensive or master plan that will ultimately have the support of the community. A variety of public participation strategies will be examined, including how to design the community engagement process and the plan implementation processes.

Speaker: Brian Currie, AICP, Consultant

Moderator: Michael DiPasquale, AICP AIA, Extension Assistant Professor, University of Massachusetts-Amherst, CPTC Board member

14. Vested Rights and Nonconforming Uses and Structures (MIIA, CPTC)

The course will cover the issue of vested rights under zoning and subdivision law, why they exist, and how they affect the work of the Zoning Boards of Appeals and Planning Boards. Participants will learn what the Zoning Act says about vested rights and the way it occurs. This session will answer the question regarding whether nonconforming structures and uses can change and if so, how much. Finally, the course will address how judicial decisions shape the way provisions of the Zoning Act are interpreted today.

Speaker: Ilana Quirk, Attorney, Freeman Law Group, LLC

Moderator: Alan Pease, Ashby Planning Board, CPTC Treasurer

15. Data 101: Where to get it, how to use it, and effective ways to message it CM | 1.5

What does "ACS" mean and how is it different than the Decennial Census? What other data sets exist? How big of a margin of error is too big? Attendees will learn (a) easy-to-use basic data resources to help understand your community from a data-driven perspective, (b) how to be a critical consumer of data presented by consultants, advocates, and developers, and (c) steps to take to help your community manage its data better and make it available to policy makers.

Speakers: Lily Perkins-High, Analytical Services Manager, Metropolitan Area Planning Council; Callie Clark, Director of Policy, Massachusetts Housing Partnership, Center for Housing Data

1:45 p.m. – 3:15 p.m. Afternoon Sessions (continued)

16. Inclusionary Zoning, and Zoning that is *Actually Inclusive* CM | 1.5

Nearly half of the Commonwealth's cities and towns have some form of inclusionary zoning. Yet with few exceptions, these provisions have not resulted in the creation of a significant number of affordable units. This session will explain the nuts and bolts of inclusionary zoning, review the findings of the ongoing statewide inclusionary zoning survey, explore what is and isn't working, and clarify realistic production goals.

Speakers: Katharine Lacy, AICP, Senior Planner, Massachusetts Housing Partnership, CPTC Board member; Judi Barrett, Principal, Barrett Planning Group LLC

17. How to Use Peer Reviews Effectively (Massachusetts Association of Consulting Planners) CM | 1.5

This session will provide planning directors and planning board representatives with an overview of what a peer review consultant can do, the benefits of peer reviews, the legal framework in Massachusetts, and the nuts and bolts around peer review procurement. Peer review consultants will share their experiences.

Speakers: Leonardi, Aray, AIA, Principal, Leonardi Aray Architects; Gerry Preble, P.E., LSP, President, Beals & Thomas; Kristina Johnson, AICP, Deputy Director of Planning and Community Development, Hudson, MA; Gigi Munden, P.E., Founder and Owner, Munden Engineering

Moderator: Anne McKinnon, AICP, Urban Planner, Jacobs

18. The Process of Repurposing a Shopping Mall: Factors and Forecasts of Changing Retail and Real Estate CM | 1.5

Over the past 15 years the face of retailing in New England and the US has been changing radically due to the popularity and ease of on-line shopping and shifting demographics. What will happen to these buildings and the large sites of paved land on which they sit on? This panel will reveal the possible futures for these sites and how careful planning and redevelopment can result in repurposed and redesigned projects that reestablish interest and add to the sense of place and fiscal well-being of their cities and towns.

Speakers: Robert R. Pellegrini, Jr. Esq., PK Boston Law; Matt Mrva, RLA, Associate, Director of Planning and Landscape Architecture, Bohler Engineering; Arnold Robinson, AICP, Associate | Regional Planning Director Fuss and O'Neill; Daniel LaFrance, AICP, Associate, Fuss and O'Neill; Paul Cincotta, Engineer, Owner of P. J. Cincotta Inc.; Jamie Kelleher, Axiom Architects

Interested in other courses?

Contact CPTC for On-Demand Training
coordinator@masscptc.org

For a fixed fee of \$400, a cost which may be shared by several co-hosting communities, we will have a trainer come to your city or town to address a specific learning topic

www.masscptc.org



MACP

Massachusetts Association of Consulting Planners



Shaping the Future of Your Community



An Interlocal Service of the Massachusetts Municipal Association



Who Should Attend?

- Planning, zoning, building, and conservation offices
- 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 registration is \$75 and includes buffet lunch. You may register online at masscptc.org or by mailing the enclosed Registration Form.

If paying by credit card, payment can only be made using PayPal on the CPTC website at the time of online registration.

Town checks may be sent separately and may arrive after the registration deadline.

Questions? Visit masscptc.org or call Allison Novelly 617-287-5570 or Elaine Wijnja 617-573-1360

The **Citizen Planner Training Collaborative** is a cooperative program of the UMass Amherst Center for Agriculture, Food, and the Environment; the Massachusetts Department of Housing and Community Development; Mass Audubon; the Massachusetts Association of Planning Directors; the Massachusetts Association of Regional Planning Agencies; and the Massachusetts Chapter of the American Planning Association.



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