

# Citizen Planner Training Collaborative

## Advanced Tools and Techniques for Planning and Zoning

**Eighteenth Annual Conference**  
**Saturday, March 16, 2019**  
 Hogan Conference Center  
 Holy Cross College, Worcester, MA



## 2019 Conference Schedule

8:00-8:30	Registration and Continental Breakfast					
8:30-9:00	General Opening and Welcome					
	Nuts and Bolts for Effective and Efficient Boards			Timely Topics		
<b>Early Morning Sessions</b> 9:15-10:45	1. Roles & Responsibilities, Part 1 <i>Bob Mitchell</i> <i>Bob Ritchie</i>	2. Site Plan Review <i>Pam Brown</i>	3. Designing for Healthy Communities: Public Health and Planning <i>Jessica del Rosario</i> <i>Cassandra Andersen</i>	4. Overcoming Common Objections During Planning Processes <i>Emily Torres-Cullinane</i> <i>Ben Faust</i> <i>Jenny Raitt</i>	5. Open Space and Low Impact Development <i>Amanda Loomis</i> <i>Jeff Lacy</i> <i>Kurt Gaertner</i>	6. Housing Guidance for Municipalities: Chapter 40B, Local Initiative Program (LIP), and Local Action Units (LAUs) <i>Judi Barrett</i>
<b>Late Morning Sessions</b> 11:00-12:30	7. Roles & Responsibilities, Part 2 <i>Bob Mitchell</i> <i>Bob Ritchie</i>	8. Special Permits and Variances <i>Ilana Quirk</i>	9. What can your Regional Planning Agency do for you? <i>Ralph Willmer</i> <i>Peggy Sloan</i> <i>Janet Pierce</i>	10. Now, what <b>EXACTLY</b> are you asking for? Imposing Mitigations <i>Barbara J. Saint Andre</i> <i>Judi Barrett</i>	11. Risks, Liabilities, and Opportunities: Resources for Municipal Climate Resilience <i>Deanna Moran</i> <i>Kurt Gaertner</i>	12. Hiring Private Planning Consultants & Preparing RFPs <i>Kathleen McCabe</i> <i>Anne McKinnon</i> <i>Leonardi Aray</i>
12:30-1:45	Lunch and Networking					
<b>Afternoon Sessions</b> 1:45-3:15	13. Writing Reasonable & Defensible Decisions <i>Carolyn M. Murray</i>	14. Zoning Exemptions <i>Adam J. Costa</i>	15. One City's Experience with Recreational Marijuana <i>Erin Schaeffer</i> <i>Vickie Caldwell</i>	16. An Introduction to Historic Preservation Planning <i>Christopher C. Skelly</i>	17. Tools to Visualize Your Community's Future and Make It a Reality <i>E. Heidi Ricci</i> <i>Callie Clark</i> <i>Tom Hopper</i> <i>Sarah Philbrick</i>	18. Writing Village Center Bylaws <i>Judi Barrett</i> <i>Maren A. Toohill</i>

# 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 3 courses.

Must Complete:

1. Roles & Responsibilities of Planning and Zoning Boards, Pt 1
2. Roles & Responsibilities of Planning and Zoning Boards, Pt 2

And 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 CM Credit: Workshops designated CM | 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](http://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](http://www.masscptc.org) is **Tuesday, March 12, 2019**

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 1
- 2. Site Plan Review
- 3. Public Health and Planning
- 4. Overcoming Common Objections
- 5. Open Space & Low Impact Devel.
- 6. Housing Guidance: 40B, LIP, LAU

**11:00 a.m. – 12:30 p.m.**

- 7. Roles and Responsibilities 2
- 8. Special Permits and Variances
- 9. Regional Planning Agencies
- 10. Imposing Mitigations
- 11. Municipal Climate Resilience
- 12. Hiring Consultants & Writing RFPs

**1:45 p.m. – 3:15 p.m.**

- 13. Writing Reas. & Def. Decisions
- 14. Zoning Exemptions
- 15. City's Rec. Marijuana Experience
- 16. Historic Preservation Planning
- 17. Data Tools for Community's Future
- 18. Writing Village Center Bylaws

**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 Friday, March 8, 2019.**

**Please make check payable to CPTC/ APA-MA and mail or fax this form by Tuesday, March 12, 2019 to:**

CPTC/ APA-MA, c/o Urban Harbors Institute, UMass Boston, 100 Morrissey Boulevard, Boston, MA 02125 or fax 617-287-5575

**Cancellations: Payment is required unless a written cancellation request is received by the CPTC Coordinator by Friday, March 8, 2019 at [coordinator@masscptc.org](mailto: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.

## General Opening – Welcome

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

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

Join us if you are a new Planning Board or ZBA member, building inspector or planner, or even if you are a veteran and want a refresher course on the topics. For new members this program will launch you into your role as a local official and provide an overview of the functions of the boards, statutory requirements, and the main tools of planning, zoning, and subdivision review.

**Speakers:** *Bob Mitchell, FAICP, Planning Consultant; Bob Ritchie, Attorney*

### 2. Site Plan Review (MIIA) **CM | 1.5**

The Zoning Act does not contain any provisions for the review of site plans; however, the process can be a very effective tool for planners and boards to review the details, aesthetics, and impacts of a potential project. This course explains the difference between site plan approval and special permits, the review process, the types of conditions that can be imposed on a decision, reasons for disapproval, the appeal process, and the types of information a town can require to be shown on a site plan.

**Speaker:** *Pam Brown, FAICP, Brown & Brown, P.C.*

### 3. Designing for Healthy Communities: Public Health & Planning **CM | 1.5**

This workshop will help planners connect their work to public health in concrete ways through healthy community design principles. Municipal and regional policies, regulations, and programs all offer opportunities to create the conditions people need for health, including access to opportunities for physical activity and healthy food. Topics will include both the statewide perspective and local perspective. Speakers will introduce participants to the Healthy Community Design Toolkit, a resource that provides background on why and how to integrate planning and public health, including many specific leverage points and strategies to create health through local community design, planning, and development.

**Speakers:** *Jessica del Rosario, Director of Community Initiatives, Bureau of Community Health and Prevention, Massachusetts Department of Public Health; Cassandra Andersen, Chief of Community Health, Division of Public Health, City of Worcester*

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

### 4. Overcoming Common Objections During Planning Processes **CM | 1.5**

Despite the variety of cities and towns in the Commonwealth, residents across the state tend to raise similar concerns when deciding on a zoning change or proposed development. “The traffic would be

terrible!” “Our schools are already at capacity.” “We must maintain the character of the community.” Sometimes these are valid concerns that require a technical solution. Other times these concerns connote deeper reservations that must be identified, unpacked, and resolved. And sometimes they are just excuses used to prevent change at all cost. It’s important to remember that the nature of these concerns is fluid, that the people who make them, and the issues themselves, change and therefore can be influenced. To that end the Metropolitan Area Planning Council has identified the most common of these objections and is in the process of developing strategies to overcome them. In this session we will share what we’ve learned so far and ask you to use your experience and expertise to build on and improve our strategies.

**Speakers:** *Emily Torres-Cullinane, Assistant Director of Strategic Initiatives, Metropolitan Area Planning Council; Ben Faust, Senior Policy Analyst, Metropolitan Area Planning Council; Jenny Raitt, Planning and Community Development Director, Town of Arlington*

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

### 5. Open Space and Low Impact Development—Are Your Bylaws Cutting Edge or Behind the Curve? **CM | 1.5**

Many communities have Cluster, Major Residential Development, Open Space Design, or Natural Resource Protection Zoning, and/or Low Impact Development bylaws or regulations. But the details often vary considerably. Do your rules reflect current best practices? Are they clear and understandable? Are you getting the best possible results for your community, creating attractive, environmentally sensitive designs, and meaningful open space protection? This workshop samples effective rules and regulations, including recent comprehensive overhaul of Framingham’s ordinances and examples of recently adopted OSRD/NRPZ bylaws.

**Speakers:** *Amanda Loomis, AICP, Planning Board Administrator, City of Framingham; Jeff Lacy, AICP, Planning Consultant, Rural Planning Associates; Kurt Gaertner, Director of Land Policy and Planning, Massachusetts Executive Office of Energy and Environmental Affairs*

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

### 6. Housing Guidance for Municipalities: Chapter 40B, Local Initiative Program (LIP), and Local Action Units (LAUs) (MIIA) **CM | 1.5**

This session will provide a detailed overview of M.G.L. c. 40B, §§20-23, the Comprehensive Permit Law. In addition to covering the role and responsibilities of the Zoning Board of Appeals, this session will consider how other city/town boards, commissions, and staff can help the ZBA during the permitting process and ensure that communities get the best possible Chapter 40B developments. Planning for housing production and preservation will be considered as well, including zoning and other non-40B strategies to increase the supply of affordable units on the Subsidized Housing Inventory (SHI).

**Speaker:** *Judi Barrett, Principal, Barrett Planning Group LLC*

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

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

**7. Roles and Responsibilities of Planning Boards and Zoning Boards of Appeals, 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, Planning Consultant; Bob Ritchie, Attorney*

**8. 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:** *Ilana Quirk, Esq., Freeman Law Group LLC*

**9. What can your Regional Planning Agency do for you?**

**CM | 1.5**

Regional Planning Agencies (RPAs) can provide a variety of services that benefit cities and towns. They can support municipalities that lack staff capacity or provide expertise to conduct studies, prepare plans, procure goods and services, and research future demographic trends. In this session, you will learn about the services provided by RPAs and how to arrange for their assistance.

**Speakers:** *Ralph Willmer, FAICP, Technical Assistance Program Manager and Principal Planner, Metropolitan Area Planning Council, CPTC Chair; Peggy Sloan, Director of Planning and Development, Franklin Regional Council of Governments; Janet A. Pierce, Executive Director, Central Massachusetts Regional Planning Commission*

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

**10. Now, what EXACTly are you asking for? Imposing Mitigations**

**CM | 1.5**

This session will explore the dos and don'ts and maybe's of imposing exactions or mitigation requirements on developers. It will review judicial decisions and case studies, and provide an interactive workshop as session leaders offer some “what *exactly* are you asking for?” exaction scenarios for participants to discuss.

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

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

**11. Risks, Liabilities, and Opportunities: Resources for Municipal Climate Resilience CM | 1.5**

Increasingly intense storms, more frequent droughts, heat waves, and other climate impacts present risks to local infrastructure, property, and public health. Good planning and updated land use regulations can help reduce vulnerabilities and avoid potential liability. Learn about the Municipal Vulnerability Preparedness (MVP) program and other resources, tools, case studies, and state grants that can help your community become more resilient with many co-benefits for your community's bottom line and quality of life.

**Speakers:** *Deanna Moran, Director, Environmental Planning, CLF Massachusetts; Kurt Gaertner, Director of Land Policy and Planning, Massachusetts Executive Office of Energy and Environmental Affairs*

**Moderator:** *E. Heidi Ricci, Assistant Director of Advocacy, Mass*

*Audubon, Shaping the Future of Your Community Program, CPTC Board member*

**12. Hiring Private Planning Consultants & Preparing RFPs**

**CM | 1.5**

Planning directors and planning board representatives will learn the nuts and bolts and tips on how to write an RFP for professional services that complies with Ch. 30B regulations, accurately represents what services and deliverables are desired, and attracts responsive and high-quality proposals. Example topics include: RFP outline; key Chapter 30B rules; matching available budget and scope of services; guidance on how much time to give for a response to RFP; interviews as part of the selection process, pros and cons; who is on the interview panel; and what NO prospective respondent wants to see in an RFP. This Session is presented by the Massachusetts Association of Consulting Planners.

**Speakers:** *Kathleen McCabe, AICP, EDP, Principal and Founder, McCabe Enterprises; Anne McKinnon, AICP, Planner, Jacobs Engineering Group; Leonardi Aray, AIA, Managing Principal, Leonardi Aray Architects LLC*

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

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

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

**13. Writing Reasonable and Defensible Decisions (MIIA)**

This session covers some key points that will assist boards in writing clear and defensible decisions. It describes criteria that should be contained in local zoning regulations and how these regulations relate to the types of conditions a board may impose when approving a special permit or variance application.

**Speaker:** *Carolyn M. Murray, Attorney, KP Law*

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

**14. 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.

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

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

**15. One City's Experience with Recreational Marijuana CM | 1.5**

As new recreational marijuana sales facilities receive approval, the host communities have had differing experiences with the process, from application to permitting to the impacts of the facility's opening. Hear from two municipal officials who were involved with the new Alternative Therapies Group proposal to open a retail facility in Salem.

**Speakers:** *Erin Schaeffer, Principal Planner, Town of Danvers; Vickie Caldwell, Esq., Assistant City Solicitor, City of Salem*

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

### 16. An Introduction to Historic Preservation Planning **CM | 1.5**

Planning takes years, demolitions take hours. Local preservation planning efforts can make a big difference in maintaining community character and saving historic resources from demolition. Yet, these pro-active efforts do take time to accomplish. This session will cover the basic step-by-step process of historic preservation planning covering a variety of tools used successfully throughout the cities and towns of Massachusetts.

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

### 17. Tools to Visualize Your Community's Future and Make It a Reality **CM | 1.5**

What will your community look like in 40 years? How will you meet the needs of diverse demographics while protecting water and other critical resources? This workshop will demonstrate the use of several powerful data tools that easily generate maps, graphs, and charts customized to your local needs. Tools include a 2060 land futures scenario explorer; DataTown, with community-level information for all 351 Massachusetts cities and towns; a Housing Toolbox with resources to help communities increase their supply of affordable housing; MassBuilds, a database of development projects statewide; and DataCommon, with MAPC's most requested data.

**Speakers:** E. Heidi Ricci, Assistant Director of Advocacy, Mass Audubon, Shaping the Future of Your Community Program, CPTC Board member; Callie Clark and Tom Hopper, Co-Directors, Center for Housing Data, Massachusetts Housing Partnership; Sarah Philbrick,

Socioeconomic Analyst II, North Suburban Planning Council Coordinator, Metropolitan Area Planning Council

### 18. Writing Village Center Bylaws (MIIA) **CM | 1.5**

Village Centers rely on historic development patterns to grow in a consistent and visually appealing manner. Writing a Village Center Bylaw is to move on a path towards forming a more vibrant, mixed-use, and walkable community. This workshop will walk you through the process, the benefits, and show you successful efforts.

**Speaker:** Judi Barrett, Barrett Planning LLC; Maren A. Toohill, AICP, Town Planner, Town of Littleton, CPTC Board member

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

### Interested in other courses?

Contact CPTC for On-Demand Training  
[coordinator@masscptc.org](mailto:coordinator@masscptc.org)

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

Refer to our website: [www.masscptc.org](http://www.masscptc.org)



Massachusetts Association of Consulting Planners



Shaping the Future of Your Community



## 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](http://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](http://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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