

The Citizen Planner Training Collaborative is a cooperative program of Mass Extension, the Massachusetts Department of Housing and Community Development, the Massachusetts Chapter of the American Planning Association, the Massachusetts Association of Regional Planning Agencies, the Massachusetts Federation of Planning and Appeals Boards, the Massachusetts Association of Planning Directors, and the Massachusetts Federation of Planning and Appeals Boards. UMass Extension offers education programs, materials, and employment without regard to race, color, creed, sex, age, national origin, and mental or physical handicap.

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Worcester, MA

Hogan Conference Center  
Holy Cross College  
Saturday, March 17, 2007

# ADVANCED TOOLS AND TECHNIQUES FOR PLANNING AND ZONING

SIXTH ANNUAL CONFERENCE

## CITIZEN PLANNER TRAINING COLLABORATIVE



Honest, I don't remember issuing a permit for that!!



## CONFERENCE PROGRAM!



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

# CITIZEN PLANNER TRAINING COLLABORATIVE



## ADVANCED TOOLS AND TECHNIQUES FOR PLANNING AND ZONING

### SIXTH ANNUAL CONFERENCE

**Saturday, March 17, 2007**

**Hogan Conference Center  
Holy Cross College, Worcester, MA**

### CONFERENCE SCHEDULE

8:00–9:00	Registration and continental breakfast					
9:00–9:30	Keynote Speaker: Robert Ritchie, Massachusetts Assistant Attorney General, honoring Don Schmidt					
	Sustainability	Capacity Building	Zoning & Enforcement	Smart Growth	Land Use, Housing & Revitalization	
9:45–11:15	1. Energy Conservation at the Local Level  <i>Thomas Ostberg Ian Todreas Bill Labich</i>	2. Leadership Among Neighbors  <i>Michael Kryzaneck</i>	3. Writing Reasonable & Defensible Decisions  Robert Ritchie	4. Making the Case for Smart Growth  <i>Angus Jennings Andrew Port</i>	5. Revitalizing Our Cities and Towns  <i>Deanna Ruffer Tim McGourthy Ezra Glenn</i>	6. Growth Management Opportunities & Constraints  <i>Glenn Garber Jocelyn Boucher</i>
11:30–12:30	Lunch					
12:40–1:50	7. Planning for Farms and Farmland  <i>Jesse Robertson-Dubois</i>	8. Planning with Community Support  <i>Phil Herr Eric Nakajima Jamie Greene</i>	9. Advanced Site Plan Review  <i>Evan Belansky</i>	10. Chapter 40R Case Studies  <i>Lisa Mead</i>	11. Nuts & Bolts of Brownfields  <i>Catherine Finneran Kathleen Castagna Andrew Loew</i>	12. The State of Chapter 40B  <i>Judi Barrett Barbara Saint Andre</i>
2:00–3:15	13. Stormwater Management  <i>Rich Claytor</i>	14. How to Manage a Successful Proposal Process  <i>Ralph Willmer Alan Gordon</i>	15. Roles and Responsibilities  <i>Greg McGregor</i>	16. The Community Planning Act  <i>Jeff Lacy</i>	17. Safer Roads/ Safer Places  <i>Jon Dietrich Juan Avendano</i>	18. Community-University Partnerships  <i>Sean Bender Gerald Autler</i>

Conference will take place unless State or city of Worcester is closed as official snow emergency:  
 WCVB Channel 5, Worcester TV Channel 3, or WSRS Radio 96.1 or call for a taped message at (413) 545-2188.  
 For more information please also refer to the CPTC Web site:

**[WWW.UMASS.EDU/MASSCPTC](http://WWW.UMASS.EDU/MASSCPTC)**

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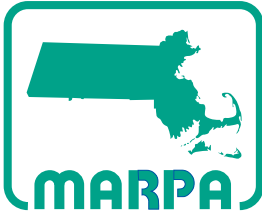


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McGREGOR & ASSOCIATES  
ATTORNEYS AT LAW, P.C.

*The CPTC Board of Directors also sincerely appreciates the support from its Advisory Board and the generosity of all the presenters who are donating their time and expertise.*

## REGISTRATION FORM

**Absolute Deadline for receiving registrations is: FRIDAY, MARCH 9, 2007!**  
*We cannot accept last-minute registrations. You can fax your form until the deadline.  
Town checks may be sent by separate mail and arrive later than the deadline if necessary.*

Name: \_\_\_\_\_ Board affiliation: \_\_\_\_\_

Street address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Daytime phone number: \_\_\_\_\_ E-mail: \_\_\_\_\_

City/town served: \_\_\_\_\_

**I want to attend the following sessions (please keep a copy of this page for yourself!)**  
**Please number your first and second choice for each time. Register early for first choice.**

### 9:45 a.m.–11:15 a.m.

- 1. Energy and Conservation
- 2. Leadership Among Neighbors
- 3. Defensible Decisions
- 4. Smart Growth
- 5. Revitalizing Cities & Towns
- 6. Growth Management

### 12:40 a.m.–1:50 p.m.

- 7. Farms and Farmland
- 8. Community Support
- 9. Advanced Site Plan Review
- 10. Chapter 40R Case Studies
- 11. Nuts & Bolts of Brownfields
- 12. The State of Chapter 40B

### 2:00 p.m.–3:15 p.m.

- 13. Stormwater Management
- 14. Successful Proposal Process
- 15. Roles and Responsibilities
- 16. Community Planning Act
- 17. Safer Roads/Safer Places
- 18. Community-University

**Directions to Holy Cross College are available at [www.umass.edu/masscptc/conferences](http://www.umass.edu/masscptc/conferences)**

**Registration fee: \$50/per person. (Receipts will be provided at registration.)**

**Refunds** granted if submitted in writing or emailed through website before **March 14, 2007. We do not confirm registrations!**

**Please make check payable to CPTC and mail or fax this form by Friday, March 9, 2007 to:**

CPTC, P.O. Box 912, Greenfield, MA 01302 or Fax to (413) 625-2099.

You may also register by E-mail—please include ALL of the above information and E-mail to [chris.skelly@comcast.net](mailto:chris.skelly@comcast.net)

**QUESTIONS? Please contact Michael DiPasquale (413) 545-2188, [www.umass.edu/masscptc](http://www.umass.edu/masscptc)**

# PROGRAM

**8:00–9:00 A.M.**

**Registration & Continental Breakfast**

**9:00–9:30 A.M.**

## Keynote Speaker

Robert Ritchie, Massachusetts Assistant Attorney General, honoring Don Schmidt

**9:45–11:15 A.M. CONCURRENT SESSIONS**

### 1. Addressing Climate Change and Energy Conservation at the Local Level

Come to learn what you can do in your community to reduce energy use and combat global climate change. The session will discuss a range of initiatives from citizen-based activities to regional action plans and municipal energy audits by ESCOs (energy service companies.) This will be a very practical session to help you change the way your community does business.

**Moderator:** *Catherine Miller, Principal Planner, Pioneer Valley Planning Commission*

**Speakers:** *Thomas Ostberg, Ameresco Energy Services Company; Ian Todreas, Citizen Member, Belmont Climate Action Committee; Bill Labich, Senior Planner, Franklin Regional Council of Governments*

### 2. Making Friends, Making Enemies: Local Leadership among Neighbors

A topic especially appropriate for planning and zoning board members in smaller cities and towns. The presentation will concentrate on a discussion of strategies of decision-making and policy implementation in communities where governmental officials face citizen opposition to proposed development initiatives or other changes to the status quo. Learn how to be an effective leader in your community without losing all your friends.

**Moderator:** *Bruce Hughes, Economic Development Specialist, Old Colony Planning Council*

**Speaker:** *Michael Kryzaneck, Professor, School of Political Science, Bridgewater State College*

### 3. Writing Reasonable and Defensible Decisions

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.

**Moderator:** *Donald Schmidt, Director, Massachusetts Smart Growth Zoning Program*

**Speaker:** *Robert Ritchie, Massachusetts Assistant Attorney General*

### 4. Making the Case for Smart Growth: Convincing Local Communities

For planners, “smart growth” means compact, efficient, and walkable communities that are environmentally, economically, and equitably responsible. For citizens it may mean more growth than they want. How do you advocate for smart growth at Town Meeting when residents and community leaders think of smart growth as planner-speak for more development? This session will skip the jargon and make a convincing argument that you can take back to your cities and towns.

**Moderator:** *Justin Sellars, Regional Planner, MAPC*

**Speakers:** *Angus Jennings, Principal Planner, Concord Square Development; Andrew Port, Town Planner, Town of Hanover*

### 5. Strategies for Revitalizing Our Cities and Towns: Success Stories from across the State

Cities and towns across the Commonwealth are using many innovative techniques to help revitalize residential neighborhoods and commercial districts. This session will highlight a range of strategies including using arts and culture to promote development in Pittsfield, mixed use development and new urbanism in downtown Worcester, and the use of a HUD Neighborhood Revitalization Strategy Area designation in Lawrence.

**Moderator:** *Sean Bender, Director, Center for Community & Learning Partnerships, Wentworth Institute of Technology*

**Speakers:** *Deanna Ruffer, Director, Department of Community Development, City of Pittsfield; Tim McGourthy, Director of Economic Development, City of Worcester; Ezra Glenn, Director, Community Development Department, City of Lawrence*

### 6. Growth Management: Opportunities for Massachusetts

This session will describe a range of growth management techniques used in other states (such as New Jersey, Maryland, Connecticut, Oregon & Vermont) and suggest techniques that might be used in Massachusetts to improve the ability of planners to manage growth and grow smarter. One such technique that will be explored is a process through which a Massachusetts statewide map of land use priorities and policies could be created to direct growth to the areas prioritized for development and away from areas prioritized for conservation.

**Moderator:** *Bob Levite, UMass Extension Educator*

**Speakers:** *Glenn Garber, UMass Extension Educator; Jocelyn Boucher, UMass Researcher (MRP 2007)*

**11:30 A.M.–12:30 P.M.**

**Buffet lunch and exhibits**

# PROGRAM

## 12:40-1:50 P.M. CONCURRENT SESSIONS

### 7. Planning for Farms and Farmland

Based on American Farmland Trust's new municipal guide for planning for agriculture and farm viability, this session will explore specific actions enabling towns to support farms and promote farmland protection. Special attention will be paid to agricultural zoning and financing farmland protection and new approaches linking these tools with agricultural economic development.

**Moderator:** *Elisabeth Krautscheid, Associate Deputy for Technical Assistance, DHCD*

**Speaker:** *Jesse Robertson-Dubois, New England Field Representative, American Farmland Trust*

### 8. Planning with Community Support: Amherst's Comprehensive Plan

Offering an overview of the CPTC core module: Planning With Community Support, this session will include a case study of "Planning Amherst Together," an ongoing public participation process the Town of Amherst is using to develop its Master Plan. Learn about tools and techniques that you can use to engage the public in a comprehensive manner for your planning process.

**Moderator:** *Robert Mitchell, FAICP*

**Speaker:** *Phil Herr, Phil Herr & Associates; Eric Nakajima, Chair, Amherst Comprehensive Planning Committee; Jamie Greene, ACP Consultants*

### 9. Advanced Site Plan Review

This session will highlight "lessons learned" and provide practical tools and techniques to ensure a successful site plan review. Topics will cover how to write effective regulations, including items such as applicability, procedural requirements, performance guarantees and design standards; how to conduct a proper review and negotiation; how to require adequate mitigation; and how to draft a legally defensible decision.

**Moderator:** *Glenn Eaton, Director of Planning & Development, Montachusett Regional Planning Commission*

**Speaker:** *Evan Belansky, Senior Planner, Town of Danvers*

### 10. Massachusetts Smart Growth Zoning: 40R Case Studies

Chapter 40R, the Smart Growth Zoning & Housing Production Act, provides financial incentives to communities that create zoning overlay districts permitting as-of-right high-density residential development in eligible locations. This session will explain the financial incentives for creating a smart growth zoning district and will highlight some early success stories.

**Moderator:** *Justin Sellars, Regional Planner, MAPC*

**Speaker:** *Lisa Mead, Principal, Blatman, Bobrowski & Mead*

### 11. The Nuts and Bolts of Brownfields Development

The reuse and redevelopment of abandoned, idled or under-utilized industrial and commercial sites (brownfields) presents both challenges and opportunities for communities. Putting these sites back into productive use can serve as a catalyst for local economic revitalization. In this session you will learn from both State and Federal experts how the State regulates brownfields development, and the resources that are available to assist cities and towns looking to redevelop brownfields sites.

**Moderator:** *Elaine Wijnja, Principal Land Use Planner, DHCD*

**Speakers:** *Catherine Finneran, Brownfields Coordinator, Massachusetts Department of Environmental Protection; Kathleen Castagna, Brownfields Project Officer, United States Environmental Protection Agency, New England; Andrew Loew, Assistant Brownfields Coordinator, Massachusetts Department of Environmental Protection*

### 12. The State of Chapter 40B: The Massachusetts Affordable Housing Zoning Law

This session will address recent applications of chapter 40B, also known as the anti-snob zoning act, in Massachusetts cities and towns. Recent legal decisions and regulatory changes that impact the law will also be reviewed. The presenters will discuss the current state of affordable housing programs, such as the Local Initiative Program, and offer strategies for cities and towns to prepare for and review comprehensive permit applications. The presenters will also discuss Planned Production as a comprehensive permit planning tool.

**Moderator:** *Bruce Hughes, Economic Development Specialist, Old Colony Planning Council*

**Speakers:** *Judi Barrett, Planner, Community Opportunities Group, Inc.; Barbara Saint Andre, Attorney, Petrini & Associates, P.C.*

## 2:00-3:15 P.M. CONCURRENT SESSIONS

### 13. Stormwater Management Plan Review\*

One of our most requested topics. This session will include an overview of basic submission requirements (what to expect in terms of plans and computations), and how to check to make sure the submission meets your local Subdivision Rules. You will also learn about some of the key treatment practices for reducing non-point source pollution, and a strategy for ensuring long term maintenance of these practices.

**Speaker:** *Richard Claytor, Principal, Horsley Witten Group*

# PROGRAM

## 14. How to Manage a Successful Proposal Process

In this session you will learn how to oversee the process of hiring a consultant for planning services. Find out how to write a Request for Qualifications/Request for Proposals; how to conduct the selection and interview process; how to deal with the contract between the consultant and the 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.

**Moderator:** *Linda Finan, Executive Director, Massachusetts Federation of Planning and Appeals Board*

**Speakers:** *Ralph Willmer, Senior Planner/Project Manager, Vanasse Hangen Brustlin, Inc.; Alan Gordon, Town Planner, Town of Charlton*

## 15. Roles and Responsibilities of Planning and Zoning Boards

This CPTC core course presents an excellent overview for new board members and building inspectors. The session maps out the main laws and tools relevant to planning and appeals boards and the rules for proper conduct as a local official serving a vital role in local government. It will cover both powers and duties.

**Moderator:** *Laila Michaud, Executive Director, Montachusett Regional Planning Commission*

**Speaker:** *Greg McGregor, Principal, McGregor Associates*

## 16. The Community Planning Act: What It Means for Local Land Use Boards

The Community Planning Act is the first major updating of Massachusetts planning, zoning and subdivision control statutes in over 30 years. This session will describe how the Act encourages communities to adopt or update their local master plans and enables them to develop effective land use regulations that are consistent with those plans. The session will also explain how the Act removes statutory impediments to achieving "smart growth" so that communities can better shape their futures.

**Moderator:** *Doug Albertson, Town Planner, Town of Belchertown*

**Speaker:** *Jeff Lacy, Shutesbury Planning Board*

## 17. Safer Roads/Safer Places

Roadway accidents, congestion and pedestrian safety are issues that increasingly affect both small towns and larger cities. This session will explore new ways of looking at traffic planning as it pertains to safety and commerce. You will learn what the important parts of a Traffic Impact Study are and how to use this as part of site plan review process. See examples of proposed traffic mitigation measures and see how traffic calming is working in different communities. Included will be a discussion of sidewalk construction and pedestrian safety along MassHighway projects.

**Moderator:** *Dorr Fox, Chief Regulatory Officer, Cape Cod Commission*

**Speakers:** *Jon Dietrich, Senior Transportation Engineer, Fuss & O'Neill; Juan Avendano, Community Development Department, City of Cambridge*

## 18. Community-University Partnerships: Reaching Beyond Town-Gown and Realizing the Potential

With the arrival of the knowledge economy, few can doubt that institutions of higher-education and research have a key role to play. However, the history of town-gown relations has often been tenuous. What does campus and community success look like and how can it be developed? This session will examine the potential of community and university partnerships, highlighting examples of cities and towns that have benefited from this kind of collaboration.

**Moderator:** *Elaine Wijnja, Principal Land Use Planner, DHCD*

**Speakers:** *Sean Bender, Director, Center for Community & Learning Partnerships, Wentworth Institute of Technology; Gerald Autler, Senior Project Manager/Planner, Boston Redevelopment Authority*

**\*Participation in these sessions may entitle the town to credit under the MIIA Rewards program towards Public Officials Liability insurance.**

**CPTC workshops may also be eligible for activities under the Commonwealth Capital Program.**

# DIRECTIONS TO CONFERENCE

From Route 290 in Worcester, take Exit 11 (College Square) and follow signs for College Square. Cross over to the far right lane and take the first right steeply uphill before the traffic light. Holy Cross College will be on your left. Go up and turn left into the last gate (number 7). The Hogan Center is the second building on the left.

**For more information, visit [www.umass.edu/masscptc/conferences.html](http://www.umass.edu/masscptc/conferences.html)**