



## Citizen Planner Training Collaborative

# Advanced Tools and Techniques for Planning and Zoning

## Ninth Annual Conference

**Saturday, March 20, 2010**

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

### 2010 Conference Schedule

8:00-9:00	Registration and continental breakfast					
9:00-9:45	Welcome: Larry Adams, Chair, CPTC Board of Directors, Executive Director Central Mass Regional Planning Commission Keynote Speaker: Andre Leroux, Executive Director, Massachusetts Smart Growth Alliance					
	Timely Topics			Nuts and Bolts for Effective and Efficient Boards		
10:00-11:30	1. A Second Chance to Protect Our Forests: Roles for Municipalities <i>Bill Labich Jay Rasku Jeff Lacy</i>	2. Working with Your Conservation Commission <i>Ross Povenmire Wayne Felden</i>	3. Introduction to the Neighborhood Road Design Guidebook <i>Peter Lowitt Jeff Rhuda Chris Kluchman Mike Scott</i>	4. Special Permits and Variances <i>Luke Legere</i>	5. Roles and Responsibilities 1 <i>Robert Mitchell Robert Ritchie</i>	6. Zoning Exemptions <i>Nathaniel Stevens</i>
11:45-12:45	Lunch					
1:00-2:15	7. Municipal Affordable Housing Trusts <i>Jennifer Goldson Connie Kruger Kathleen O'Donnell</i>	8. Introducing Land Use Strategies for Successful Town Meeting Vote <i>Angus Jennings Mark Radcot Karen Cullen</i>	9. Working with Architects and Design Professionals <i>Stephen Schreiber Michael DiPasquale</i>	10. Creating Master Plans <i>Judi Barrett</i>	11. Roles and Responsibilities 2 <i>Robert Mitchell Robert Ritchie</i>	12. Writing Reasonable and Defensible Decisions <i>Elizabeth Lane</i>
2:15-2:40	Break					
2:45-4:00	13. Economic Development for Cities and Towns <i>Kathleen McCabe Michael Milanoski</i>	14. Planning by Chance: Use Variances and Spot Zoning <i>Barbara Saint André Judi Barrett</i>	15. Green Communities Act—How's It Working? <i>Meg Lusardi Catherine M. Ratté Doug Albertson</i>	16. Traffic 101—How to Understand Traffic Reports <i>Joe Wanat</i>	17. Ethics for Municipal Boards <i>James Lampke</i>	18. Your Conservation Subdivision By-law: Is It Working? <i>Robert Levite</i>

The conference will take place unless the State or city of Worcester is declared CLOSED as part of an official snow emergency: WCVB Channel 5, Worcester TV Channel 3, or WSRB Radio 96.1 or call for a taped message at (413) 545-2188. Also refer to the CPTC Web site for cancellation information:

[www.umass.edu/masscptc](http://www.umass.edu/masscptc)

# Program

**8:00–9:00 a.m.**

Registration & Continental Breakfast

**9:00–9:45 a.m.**

## Welcome

*Larry Adams, Chair CPTC Board of Directors, Executive Director  
Central Mass Regional Planning Commission*

## Keynote Speaker

*Andre Leroux, Executive Director, Massachusetts Smart  
Growth Alliance*

**10:00–11:30 a.m. Morning Sessions:**

### 1. A Second Chance to Protect Our Forests: Roles for Municipalities (AICP)\*

This session presents three innovative ways that municipalities can help conserve natural resources, especially our forests. First, is the "Wildlands and Woodlands Vision" and the regional and landscape-scale conservation practices that can support its implementation across the Commonwealth and New England. Second is the North Quabbin Regional Landscape Partnership (NQRLP). See how it supports municipalities in their pursuit of conservation activities that protect natural and cultural resources, which cross town, county and state boundaries. Third, learn how a Natural Resource Protection Zoning (NRPZ) bylaw was designed for the Towns of Shutesbury and Brewster, MA to protect large forest blocks and drinking water aquifers.

*Speakers: Bill Labich, Regional Conservationist, Highstead;  
Jay Rasku, Coordinator, North Quabbin Regional Landscape  
Partnership; Jeff Lacy, Regional Planner, Massachusetts  
Department of Conservation and Recreation.*

*Moderator: Heidi Ricci, Senior Policy Analyst, Massachusetts  
Audubon Society*

### 2. Working with Your Conservation Commission (AICP)\*

Learn how to improve communication between Conservation Commissions and other municipal agencies and Boards. This session will describe the key Boards, officials and agencies involved and how they can interact more successfully with the Conservation Commission. Based on their own experiences, the speakers will present both general approaches to improving communication and specific examples of projects that illustrate successful conservation/planning collaborations.

*Speakers: Ross Povenmire, Planner, Conservation Agent and  
Community Preservation Agent, Town of Boxford; Wayne  
Feiden, FAICP, Director of Planning and Development City  
of Northampton*

### 3. An introduction to the Neighborhood Road Design Guidebook: Planning for Climate Change and Healthy Neighborhoods (AICP)\*

Learn about a new resource for towns and cities created by a joint Steering Committee of members of the Massachusetts Homebuilders and the Massachusetts Chapter of the American Planning Association. The guidebook tells how and why local governments can design "complete streets" and use a "Context Sensitive Design" approach. The award winning 2006 *MassHighway Design* manual explored this new approach for large roads—this guidebook brings it to the local level.

*Speakers: Peter Lowitt, Land Use Administrator, Devens  
Enterprise Commission; Jeff Rhuda, Symes Associates, Inc.;  
Chris Kluchman, Principal, Eaton Planning; Mike Scott, P.E.,  
Waterman Design Associates*

*Moderator: Catherine M. Ratté, Principal Planner—  
Sustainability, Pioneer Valley Planning Commission*

### 4. Special Permits and Variances

Are you clear about the difference in purpose and process between Special Permits and Variances? Learn about key issues and the complex criteria for making decisions on Variances and Special Permits, as well as important procedural requirements to avoid automatic approval. The session discusses the issues and considerations for making decisions, including the importance of meeting timelines and following procedural requirements.

*Speaker: Luke Legere, Esq., McGregor & Associates*

### 5. Roles and Responsibilities 1

Are you a new Board member or building inspector? This program will launch you into your role as a local official, introduce you to the functions of the two boards and the main tools of planning and zoning. Presented in two parts to cover the large amount of information and provide time for questions and answers. We encourage you to sign up for Parts 1 and 2.

*Speakers: Bob Mitchell FAICP, Special Assistant for Planning  
Initiatives, Massachusetts Executive Office of Housing &  
Economic Development; Robert Ritchie, General Counsel,  
Massachusetts Department of Agricultural Resources*

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

### 6. Zoning Exemptions

The Zoning Act provides certain exemptions for agricultural, educational, childcare and religious uses, as well as state and federal land and uses from local zoning regulations. This session explains these exemptions, how they relate to the Fair Housing Act and identifies the circumstances under which municipalities can enact and impose zoning regulations.

*Speaker: Nathaniel Stevens, Esq., McGregor & Associates*

**11:45 a.m.–12:45 p.m. Lunch**

# Program

## 1:00–2:15 p.m. Early Afternoon Sessions:

### 7. Municipal Affordable Housing Trusts (AICP)\*

Learn how to form and operate a Municipal Affordable Housing Trust under the 2005 state statute. Presenters will cover the steps involved in organizing a trust, gaining support for local adoption, and examples of affordable housing activities that successful Municipal Affordable Housing Trusts have undertaken in the state. The *Municipal Affordable Housing Trust Guidebook*, prepared by Mass Housing Partnership, will be provided to session attendees.

**Speakers:** Jennifer Goldson, JM Goldson community preservation + planning; Connie Kruger, Senior Program Manager, Mass Housing Partnership; Kathleen O'Donnell, Esq.

### 8. Introducing Land Use Strategies for Successful Town Meeting Vote

The inability to garner support for approval of land use strategies at town meetings has been cited as the biggest impediment for land use reform. The workshop will focus on successful ways to reach out and build public support to obtain voters' support at Town Meeting.

**Speakers:** Angus Jennings, AICP, Director of Land Use Management, Town of Westford; Mark Racicot, Manager, Land Use Division, Metropolitan Area Planning Council; Karen Cullen, AICP, Principal Planner, Concord Square Planning & Development, Inc.

**Moderator:** Miryam Bobadilla, Technical Assistant Coordinator, DHCD

### 9. Working with Architects and Design Professionals

The range of services provided by architects and design professionals will be explained, along with how cities and towns can work with designers to achieve the type of built environment they desire. The architect's involvement in creating master plans, feasibility studies, computer renderings and construction drawings will be discussed. Also included will be a presentation of the legal issues regarding the practice of architecture and other design professions.

**Speakers:** Stephen Schreiber, FAIA, Director and Professor Architecture + Design Program, UMass Amherst; Michael DiPasquale, CPTC Director and UMass Extension Educator

### 10. Creating Master Plans

The creation of a Master Plan (or Comprehensive Plan) under M.G.L. c. 41, s. 81D can help your community address critical needs and issues. This session will cover why and how to prepare, adopt, and implement a Master Plan. You will see examples of several Master Plans recently prepared for Massachusetts cities and towns, and hear about the steps they took to engage local residents and businesses in the planning process. You also will hear about ways to approach implementation and how to make a Master Plan a "living document."

**Speaker:** Judi Barrett, Director of Planning, Community Opportunities Group, Inc.

**Moderator:** Catherine M. Ratté, Principal Planner—Sustainability, Pioneer Valley Planning Commission

### 11. Roles and Responsibilities 2

Part 2 of this important and popular topic will focus on the Open Meeting and Public Records Laws. Conflict of Interest Law will be discussed only briefly. For more information on Conflict of Interest, we recommend attending Session No. 17.

**Speakers:** Bob Mitchell FAICP, Special Assistant for Planning Initiatives, Massachusetts Executive Office of Housing & Economic Development; Robert Ritchie, General Counsel, Massachusetts Department of Agricultural Resources

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

### 12. 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.

**Speaker:** Elizabeth Lane, Esq., Kopelman & Paige PC

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

## 2:15–2:40 Break

## 2:45–4:00 p.m. Late Afternoon Sessions:

### 13. Economic Development for Cities and Towns (AICP)\*

Learn what you and your community can do to have a healthy and competitive economy. Topics discussed include defining economic development; understanding the local and regional economy; the economic base study; business location considerations; economic development and business retention strategies; economic impacts and multipliers; business clustering; and the role that incentives play.

**Speakers:** Kathleen McCabe, AICP, EDP, President, Massachusetts Economic Development Council (MEDC) and principal of McCabe Enterprises; Michael Milanoski, AICP, CED, MEDC Board member

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

### 14. Planning by Chance: Use Variances and Spot Zoning (MIIA)

Examine the planning and legal implications of land use change by chance—spot zoning on one hand, and use variances on the other, both being available means of "subverting" orderly planning and land use policymaking. The presenters will examine what constitutes "spot" zoning versus zoning based on sound planning principles, as well as the legal requirements and policy implications of use variances. The broader principles underlying zoning use categorizations will also be discussed.

**Speakers:** Barbara Saint André, Attorney, Petrini & Associates, P.C.; Judi Barrett, Director of Planning, Community Opportunities Group, Inc.

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

## Program

### 15. The Green Communities Act: How's It Working? (AICP)\*

In 2008, the Governor signed the Green Communities Act which created a new program within the Department of Energy Resources to provide assistance to cities and towns on all matters related to energy. This includes providing technical assistance to help Massachusetts municipalities become Green Communities. Hear from DOER, a regional planning agency, and a participating town on how this program is working.

**Speakers:** *Meg Lusardi, Deputy Director for Green Communities at the Department of Energy Resources; Catherine M. Ratté, Principal Planner-Sustainability for the Pioneer Valley Planning Commission; Doug Albertson, Town Planner for Belchertown*

### 16. Traffic 101: How to Understand Traffic Reports

Learn the basics of and assumptions behind traffic analyses and parking studies and what questions to ask when you receive a 2-inch thick report. You will learn about innovative and non-conventional ways of dealing with transportation challenges.

**Speaker:** *Joe Wanat, PE, PTOE, Vanasse, Hangen, Brustlin, Inc.*

**Moderator:** *Sujatha Mohanakrishnan, Project Manager, Central Mass. Regional Planning Commission*

### 17. Ethics for Municipal Boards under the New Ethics Law (AICP\* & MIIA )

This session focuses on the state's Conflict of Interest laws and in particular the new changes to the law under c. 28 of the Acts of 2009. Learn about your legal responsibility as a board member, staff person or consultant to carry out your duties in an open, welcoming and ethical manner. This session only briefly mentions the Open Meeting and Public Records Law. For more information about these topics, we recommend attending Session No. 11, "Roles & Responsibilities, Part 2," 1:00–2:15 p.m.

**Speaker:** *James B. Lampke, Esq., Executive Director City Solicitors and Town Counsel Association; Town Counsel-Town of Hull; Principal, Lampke and Lampke*

### 18. Your Conservation Subdivision By-law: Is It Working? (AICP)\*

The problems and solutions that towns and local land trusts face when a developer is setting aside open space pursuant to Planning Board or ZBA mandates will be covered. Learn about the necessary steps to ensure protection, pitfalls to be avoided, and long-term stewardship issues. A range of bylaws that Massachusetts towns have implemented to encourage open space developments will be highlighted.

**Speaker:** *Robert Levite, Esq. UMass Extension*

## 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 \$50 and includes buffet lunch. (Attendees will also receive valuable handout materials produced by CPTC). Payment is due with registration (see

form), except Town checks may be sent separately and may arrive after the deadline. Questions? [www.umass.edu/masscptc](http://www.umass.edu/masscptc) or Michael DiPasquale, at (413) 545-2188.

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

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, the Massachusetts Association of Planning Directors, and the Massachusetts Federation of Planning and Appeals Boards.

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 [www.umassextension.org/civilrights](http://www.umassextension.org/civilrights).

# Get Credit for Taking CPTC Courses

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

## CPTC Certificate Program

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

1. The Roles and Responsibilities of Planning and Boards of Appeals
2. Introduction to the Subdivision Control Act
3. Introduction to the Zoning Act
4. 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" entitle the participant to one hour of credit under the AICP Certification Maintenance (CM) program.

Workshops designated with an asterisk (\*) have been submitted to AICP for CM credit. If approved, these sessions will also entitle the participant to credit. Additional information will be provided in February 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.

## Commonwealth Capital Program

Attendance at CPTC training sessions by city and town Board members is an eligible activity under the state's Commonwealth Capital program. Communities can receive additional points in their Commonwealth Capital application by sending Board members to CPTC sessions.

# Registration Form

**Absolute Deadline for receiving registrations is: FRIDAY, MARCH 12, 2010!**

*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 (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.

### 10:00 a.m.–11:30 a.m.

- 1. 2nd Chance to Protect Forests
- 2. Conservation Commission
- 3. Road Design Guidebook
- 4. Special Permits and Variances
- 5. Roles and Responsibilities 1
- 6. Zoning Exemptions

### 1:00 p.m.–2:15 p.m.

- 7. Municipal Housing Trusts
- 8. Land Use Strategies
- 9. Architects and Design Pros
- 10. Creating Master Plans
- 11. Roles and Responsibilities 2
- 12. Writing Defensible Decisions

### 2:45 p.m.–4:00 p.m.

- 13. Economic Development
- 14. Variances and Spot Zoning
- 15. Green Communities Act
- 16. Traffic 101
- 17. Ethics for Municipal Boards
- 18. Conservation Subdiv. By-law

**Registration fee: \$50/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 12, 2010 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 [cptc-registration@comcast.net](mailto:cptc-registration@comcast.net)

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

**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.

# Conference Program!



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



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### Ninth Annual Conference

# Advanced Tools and Techniques for Planning and Zoning

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