

July 2016

WELLESLEY UNIFIED PLAN RFP

Town of Wellesley, Massachusetts



Technical Proposal

RKG
ASSOCIATES INC

Table of Contents

INTRODUCTION	1
OUR WELLESLEY TEAM	2
RKG ASSOCIATES, INC.	2
DODSON & FLINKER	5
JM GOLDSON	7
ASG PLANNING	8
WHAT WE WILL DO – AND HOW.....	9
GETTING STARTED	9
COMMUNITY PARTICIPATION	10
CORE ELEMENTS: VISION AND GOALS, NEEDS ASSESSMENT, DESIRED LONG-TERM OUTCOMES.....	13
STRATEGIC PLAN FRAMEWORK & PLAN IMPLEMENTATION	20
THE PLAN	21
DELIVERABLES	22
ANTICIPATED PROJECT SCHEDULE	23
OUR EXPERIENCE & QUALIFICATIONS.....	24
RKG ASSOCIATES, INC.	24
DODSON & FLINKER	25
JM GOLDSON	26
ASG PLANNING	27
OUR REFERENCES.....	29
PROPOSAL CERTIFICATIONS	
PROJECT TEAM RESUMES	

Introduction

RKG RKG Associates, Inc., is excited about the opportunity to help the Town of Wellesley develop a Unified Plan (UP) that can guide local decisions and track the effectiveness of local actions over the next ten years. The Unified Plan will update Wellesley's 2007-2017 Comprehensive Plan within a "wraparound" strategic plan. This means the product of Wellesley's effort is not simply two plans packaged in one volume but actually one plan and one planning process. Our proposal anticipates that Wellesley's UP will be structured as a strategic plan and that the primary tool or process for developing the plan will be a Logic Model.

The UP planning process will seek to clarify the Town's mission as a unit of government and set both a direction and desired outcomes for Wellesley's physical, social, and economic development. Each core component of the plan will consist of the following:

- A needs assessment;
- An understanding of the resources and barriers affecting each component;
- The programs, services, and facilities provided or carried out by the Town to meet community needs (including the planned actions that comprise the master plan implementation program);
- An understanding of how the Town's efforts to address community needs can be measured;
- The tangible or direct outcomes the Town will look for in order to gauge the effectiveness of its policies and actions;
- And most importantly, clarity about the longer-term, comprehensive impact (the vision) the Town seeks as a result of its efforts in each topic area or component of the plan.

This model of strategic planning is efficient, focused, and clear, and it can be readily applied to the traditional elements of a comprehensive master plan as well as the programmatic, policy, and service delivery functions of city or town. As our proposal demonstrates, the consulting team that RKG Associates has organized for Wellesley's UP is uniquely qualified for this engagement. We have brought together the best people in the community planning and organizational strategic planning to provide the innovative planning product that Wellesley wants to produce as a result of this engagement.

Our Wellesley Team

RKG Associates, Inc. has assembled an outstanding team of professionals for the Wellesley Unified Plan. Together, we bring extensive experience and a proven record of accomplishments with municipal planning, strategic planning, zoning, economic development, housing, open space and resource protection, transportation planning, historic preservation, and community engagement. Our team includes the firms and individuals listed below. (More information about each firm's qualifications and full resumes of project personnel can be found in later sections of the proposal.)

RKG ASSOCIATES, INC.

RKG is a full-service planning, economics, and real estate consulting firm with offices in Quincy, MA; Alexandria, VA; Dover, NH; and Atlanta, GA. Founded in 1981, RKG has successfully completed more than two thousand consulting projects regionally, nationally and internationally, providing a comprehensive range of market research, economic, planning, and financial feasibility services to government, business, and institutional clients. The firm has grown to become one of the most respected market, economic, and real estate advisory consulting firms in the United States. Our four field offices work collaboratively on a wide variety of engagements, from small consulting projects to market studies and strategic plans for military base closure. We are hands-on, practical, creative problem-solvers who love what we do and bring our enthusiasm to every assignment.

CORE SERVICE AREAS

Planning Services

- Comprehensive Plans
- Housing Plans and Studies
- Brownfields Redevelopment
- Military Base Reuse
- Community Visioning and Goals
- Tax Base Management Strategies
- Municipal Service Studies
- Transportation and TOD Planning

Economic Consulting Services

- Downtown Revitalization and Urban/Waterfront Redevelopment
- Economic Development Strategies
- Fiscal and Economic Impact Analysis
- Labor Force Studies
- Target Industry Analysis

Real Estate Services

- Real Estate Market Research
- Market Feasibility Studies
- Highest and Best Use Studies
- Financial Feasibility Analysis
- Real Estate Appraisals
- New Construction, Land Development and Adaptive Reuse

RKG's planners have participated in numerous community master plans, affordable housing plans, and economic development strategies for public and private clients. We are currently leading the master plan process in Littleton and collaborating with Crosby, Schlessinger, and Smallridge to prepare a new master plan for Natick, with The Cecil Group for a master plan in Burlington, and with Community Circle for a master plan in Kittery, ME.

RKG's national experience gives us a unique perspective on community planning and easy access to "best practices" throughout the country. For example, we have prepared dozens of economic development strategies for closed or scaled-back military bases. In the past few years, RKG has been hired to prepare market studies and strategic plans for Midwestern communities that suffered severe housing losses to hurricanes and other national disasters, and we have developed a specialization in "town-gown" housing issues, too. RKG recently completed a rental housing market study and needs assessment for Montgomery County, MD, the first jurisdiction in the country to adopt inclusionary zoning. We are also working on a comprehensive neighborhood development plan for the City of Rochester, NY, and with Dodson Flinker on hamlet plans for East Hampton, NY.

**RUSSELL A. ARCHAMBAULT, Vice President and Principal
Principal in Charge**

Russ Archambault joined RKG Associates, Inc. in 1994, and has nearly twenty years of experience in community and economic development, economic and fiscal impact analysis, real estate market research, and development feasibility analysis. Since joining RKG Associates, Russ has applied his background to managing numerous projects throughout the U.S. in areas of urban and waterfront redevelopment, market and development feasibility, local and regional economic development, military base reuse planning, and transportation economics. Russ has also lead the development of RKG's fiscal planning expertise, which assists local governments in understanding the municipal service impacts of local land use decisions and policies. He is a national speaker on issues of urban redevelopment and fiscal planning.

Before joining RKG Associates, Russ led the Community Development Department for the City of Laconia, New Hampshire and served as project manager for the Virginia Tech Economic Development Assistance Center in Blacksburg, Virginia. He holds a Bachelor of Science in Public Management from Plymouth State University, Plymouth, NH, and a Master of Urban and Regional Planning from Virginia Polytechnic Institute and State University (Virginia Tech), Blacksburg, VA.

**JUDI BARRETT, Director of Municipal Services
Project Manager**

Judi Barrett is Director of Municipal Services with RKG Associates, Inc. She has 30 years of experience in planning and community development and specializes in local government services. She provides support to cities and towns on a wide variety of municipal planning engagements: comprehensive plans, downtown plans, community development plans, strategic plans for neighborhood revitalization, and park and open space plans. As an experienced fiscal impact analyst, Judi is frequently called upon for socioeconomic evaluations of major development

projects. She is well known for her public participation skills and she has a particular passion for engaging a community's youth in the planning process.

Judi's planning practice includes extensive zoning experience. She has worked nationally on inclusionary zoning and has provided comprehensive regulatory reform, zoning audits, and recodification for many communities in New England. In addition, Judi has worked extensively in the field of affordable housing. She has written numerous housing plans and helped city and town boards with the permitting process for affordable housing and developer negotiations. She is a Chapter 40B Technical Assistance Consultant for the Massachusetts Housing Partnership (MHP) and the author of MHP's forthcoming Chapter 40B Guidebook (Update) for Boards of Appeal.

Judi is a frequent panelist and guest speaker at professional conferences and a trainer for the Citizen Planner Training Collaborative (CPTC) and Massachusetts Chapter of the American Planning Association. She is the author of several CPTC training modules for cities and towns, notably "Creating a Master Plan" and "Planning with Community Support." Prior to joining RKG, she served as Director of Planning with Community Opportunities Group, Inc. She also worked for DHCD as Program Manager of the Community Development Fund and for the Town of Plymouth as Community Development Director. Judi holds an A.B. from Harvard University and has completed graduate-level coursework in community development and geography at Harvard, Tufts, and UMass-Boston.

ERIC HALVORSEN, AICP

Principal Planner and Senior Project Analyst

Eric has over ten years of experience in land use and transportation planning. He graduated from Rutgers University with a degree in Environmental Planning and Design and graduated from the University of Illinois with a Master's Degree in Urban and Regional Planning. Prior to working at RKG Associates, Eric worked for the Metropolitan Area Planning Council as the Assistant Director for Transportation. In addition, he also worked in Illinois for a regional planning agency managing corridor studies, business district revitalization plans, and updating the agency's Long Range Transportation Plan.

Eric specializes in helping communities develop plans that bridge the topics of land use and transportation. This includes master plans, downtown plans, corridor plans, and site specific plans. Eric's focus is on formulation of realistic and actionable plans that can be achieved incrementally over time. He also has experience working with municipalities to develop bicycle and pedestrian network plans, transit plans, and parking strategies. He also has significant experience with public engagement, crafting processes for groups as small as 5 and as large as 300. These include highly interactive open houses, site walks, town hall meetings, small group facilitation, focus groups, and project working groups. He believes in purposeful, meaningful, and inclusive engagement of all members of the community. Eric also received facilitation training from the Interactive Institute for Social Change (IISC).

Eric is a member of the American Planning Association, a member of the American Institute of Certified Planners (AICP), and was a founding Board member of the Boston Chapter of Young Professionals in Transportation.

PATRICK MCCAFFERTY
Planner/GIS Analyst

Patrick McCafferty is a gifted analyst and an expert in advanced GIS applications. He is a strong proponent of the important role geography can play in untangling complex issues. Patrick's professional background is rooted in implementing geographic analysis to demystify the real estate market and tackle targeted socio-economic issues. He provides technical assistance, statistical analysis, and customized reports for clients across the country. His interests and expertise includes; transit oriented development, fiscal impact, spatial statistics, GIS, and trend analysis.

During his tenure with RKG, Patrick has contributed GIS and analytical support to economic development, regulatory reform, needs assessment, and fiscal impact projects throughout the U.S. Most recently, he formulated the model using advanced spatial regression in combination with detailed mapping techniques in order to forecast the effect of proximity to proposed train stops on property values in Somerville, MA. Prior to joining RKG, Patrick was a Senior Research Analyst with the City of Boston's Assessing Department. With the city, he engineered a new land valuation technique from a linear approach to a geographically based, fitted, three-dimensional response surface and was also responsible for formulating the assessment model for multi-family housing.

Patrick holds a Bachelor of Arts in Urban/ Regional Planning from Miami University in Oxford, Ohio, and a Master of Arts in Community Development and Planning from Clark University.

Dodson & Flinker

Over the past thirty years, Dodson & Flinker has merged landscape architecture and planning at three distinct, interconnected scales. At each of these scales, projects are unified by core guiding principles that are applied to the unique demands of each particular client and site. The diversity of the practice in turn benefits each project, offering avenues to apply and test ideas through a range of scales. Over time, the firm's early principles have been tested, and proven successful, creating a larger body of knowledge and tools for individuals, municipalities, states, regions, as well as a portfolio of outstanding built work.

Standing firmly on these core principles, Dodson & Flinker integrates these principles throughout the design process, mastering the complexities of analyzing information, synthesizing data, listening, identifying needs and programs, and preparing supplemental visual graphics, documents, and guidelines. The firm builds consensus on every project, working with clients, communities, and our colleagues to help our clients achieve an exceptional product, goal, and/or built project.

Dodson & Flinker's extensive portfolio is a testament to the firm's success. Our constructed projects illustrate our core principles at a site specific or village scale, and over time these projects

have in turn become catalysts for growth and value of a particular place. In addition, our Master plans, guidelines, and regulations developed over 25 years have proven successful tools. These projects, fully established, are now serving as precedents for contemporary trends in Smart Growth, low impact development, conservation development, form-based codes, agricultural preservation, green infrastructure, and context sensitive design.

Recent Dodson & Flinker collaboration with RKG Associates: Littleton (MA) Master Plan, East Hampton (NY) Hamlet Study; and with Judi Barrett (pre-RKG), the Groton Master Plan.

PETER FLINKER, ASLA, AICP-CEP, LEED AP
Principal, Dodson & Flinker

Peter Flinker received a Master's in Landscape Architecture from the University of Massachusetts in 1987 and has been with Dodson Associates ever since, becoming a principal in 1999. As both a registered Landscape Architect and member of the American Institute of Certified Planners, Peter has focused his work on projects that bridge the gap between site design and planning at the town and regional scale. Peter maintains an active portfolio of work that includes downtown revitalization, watershed protection, greenway planning and sustainable design for new communities. He is a frequent presenter to conservation groups, town boards and professional organizations on the topics of smart growth and sustainable development.

As an author and illustrator, Peter has prepared numerous publications designed to help both professionals and laypeople understand complex planning and design concepts. These projects include *The South County Design Manual*, winner of a 2002 national honor award from the American Society of Landscape Architects, and the *Rhode Island Conservation Development Manual*. Another recent publication, the *Urban Environmental Design Manual*, winner of a 2007 merit award from the Boston Society of Landscape Architects, applies the firm's unique visual approach to explore how low impact development techniques can be combined with urban revitalization to build more sustainable communities. Each of these publications combines a general introduction to the topic with case studies and detailed instructions for implementing the techniques at the local level. In 2015, Peter published *Village Guidance: Tools and Techniques for Rhode Island Communities*, a comprehensive guide to village planning and design.

NATE BURGESS
Associate

Nate graduated from the University of Virginia in 2013 with a master's degree in landscape architecture. He brings to the firm exceptional technical skill in Geographic Information Systems, CAD, and three-dimensional visualization. In addition to receiving fellowships, scholarships and awards as a master's candidate, Nate has published multiple articles on adapting to climate change in coastal regions, building on his undergraduate degree in geology from the College of William and Mary. Before moving to the Pioneer Valley area, he worked in Washington D.C. as a trainee with the National Park Service's Historic American Landscape Survey, documenting the historic Wood National Cemetery in Milwaukee, WI.

JM Goldson

Founded in 2006, JM Goldson community preservation + planning assembles a team of professional planners to provide communities with a holistic and thoughtful approach to community preservation and planning. JM Goldson's approach focuses on protecting community assets and enhancing housing choice in ways that are compatible with broader community and regional goals. JM Goldson is renowned for facilitating highly-interactive public engagement and customizing services to best meet client needs. Located in Boston, JM Goldson's work represents a wide range of projects tailored to best meet the individual needs of client communities. The firm's clientele includes a mix of public and private sector clients.

JM Goldson has a strong track record assisting communities with community visioning and master planning, community preservation, and affordable housing planning and implementation, including Community Vision Plans, Housing Production Plans, Housing Needs Assessments, Community Preservation Plans, and Affordable Housing Trust Action Plans. Among the firm's municipal clients are Agawam, Amherst, Arlington, Barnstable, Brewster, Bridgewater, Brookline, Concord, Eastham, Easton, Hopkinton, Grafton, Manchester-by-the-Sea, Medway, Middleborough, Norwood, Pelham, Stockbridge, Stoughton, Somerville, Southborough, Sudbury, West Bridgewater, Westford, Westport, and Williamstown.

Recent JM Goldson collaboration with RKG Associates: Brookline (MA) Housing Production Plan, Nantucket Housing Production Plan, Brewster Housing Production Plan.

JENNIFER M. GOLDSON, AICP Principal

Jennifer M. Goldson's 20+ year professional background blends affordable housing, comprehensive planning, historic preservation, open space conservation, community engagement, and implementation of the Massachusetts Community Preservation Act. She is certified by the American Institute of Certified Planners and is a member of the International Association of Facilitators. Jennifer is the principal author of multiple guidebooks published by the Massachusetts Housing Partnership including the Community Preservation Act and Affordable Housing guidebook, *Create, preserve, support* (2016), the *Municipal Affordable Housing Trust Implementation Manual* (2015), and the award-winning *Municipal Affordable Housing Trust Guidebook* (2009). In 2008, Jennifer was the primary author of the Community Preservation Coalition's *CPA Update*, a monthly email-newsletter subscribed to by Community Preservation Committees across the state.

Amanda Berman Senior Community Preservation Planner

Amanda Berman joined JM Goldson community preservation + planning in June 2016 as a Senior Community Preservation Planner. Amanda's 13+ years of professional experience includes community and economic development, cultural planning, public space planning and programming, program and event development, community outreach and engagement, and marketing. Amanda is a recent transplant to the Boston area from Los Angeles, where she served

as the Director of Community Development and Planning for Community Arts Resources (CARS) for eight years. In this role, Amanda had the unique opportunity to work with Southern California municipalities and other government agencies on visioning plans that pushed forward strategic civic initiatives, such as new complete street corridors and public spaces.

Amanda has a strong track record of incubating and managing innovative and interactive public programs that help to shift perceptions of a particular place or neighborhood, and has created numerous community outreach and engagement campaigns that correspond to these efforts. One such program is CicLAvia, the series of car-free, open-street events that has drawn hundreds of thousands of Angelenos to celebrate their city by bicycle and foot in ways they'd never imagined. Amanda is proud to have been one of the driving forces behind this beloved and impactful urban initiative.

Amanda holds a dual-master's degree in urban planning and public art studies from the University of Southern California, and a bachelor's degree in communications and business from The Pennsylvania State University.

ASG Planning

ASG Planning provides strategic planning and consulting services related to transportation and transit systems, urban infrastructure development and related public policy/administration. The firm specializes in transit system development and operations, working with regional and state transit agencies to enhance ongoing operations and to support the development of new services, programs and infrastructure. ASG Planning also performs strategic planning and administrative support functions for public and non-profit organizations, working to assess core organizational strengths and weaknesses and to identify actions, policies and changes that better meet core mission and lead to more effective operations.

Recent ASG Planning collaboration with Judi Barrett (pre-RKG): Grow Smart RI Land Use Training Collaborative Strategic Plan

ANNE S. GALBRAITH, AICP Principal

Anne S. Galbraith has been involved in urban planning, strategic planning, public policy and economic development projects at the state and municipal level for 30 years. Her primary expertise is focused on the development and management of urban transportation systems. In addition, Anne has capabilities that include project management, comprehensive planning, conceptual project development, cost/benefit analyses, project finance, economic development, zoning, and federal compliance.

What We Will Do – and How

The RKG Team will deliver a Unified Plan with the following components:

- Mission statements for Town government;
- A long-range community vision;
- Needs assessments, goals, and planned actions to address community needs for the plan's core components (RFP Appendix A);
- Desired outcomes that will be considered to evaluate the plan;
- Clear description of the impact the Town is striving for, and how that impact relates to and supports the community vision;
- A plan evaluation process.

Getting Started

- **Kickoff and Town Tour.** Every master plan engagement begins with a kickoff meeting for the consultants and Steering Committee to refine the project schedule, discuss and agree upon the major planning process components and target dates, clarify project coordination, communication, and administrative matters, and begin to identify key issues the planning process will need to address. Toward these ends, the RKG Team will prepare for and attend a kickoff meeting with Wellesley's Steering Committee and other Town officials. Ideally, the kickoff meeting will culminate in a tour of the Town as well. If the kickoff meeting needs to occur in the evening, we will ask the Town to schedule a daytime tour at some point shortly thereafter.
- **Participation Plan.** Based on input at the kickoff meeting, the RKG Team will prepare and submit a public participation plan, including target dates for key events (the public visioning meeting, additional town-wide workshop), meetings with the Steering Committee every four to six weeks, plans for the project website, and other opportunities to engage the public throughout the Unified Plan process. (Please see section on Community Participation, where we provide more details about the types of public participation we anticipate for Wellesley.)
- **Branding.** To distinguish the Unified Plan from other current and past efforts in town, the RKG Team will engage a set of designers to create a project logo and tagline for the project. Ideas for themes, colors, images, and words will be generated by staff and the Steering Committee and will feed into a logo design process that will be run by the RKG Team.
- **Existing Plans and Data.** At an early point in the process, the RKG Team will need to review existing, available plans and studies that the Town has on file (including but not limited to those mentioned in the Town's Request for Proposals) and identify data that we will need from various Town departments. We will appreciate assistance from the Town's project coordinator to make initial contact with Town staff and help us collect the information we

need. As part of the plan review phase, the RKG Team will seek input from the Steering Committee, Town staff, and others about the status of implementing the recommendations in Wellesley's prior Master Plans.

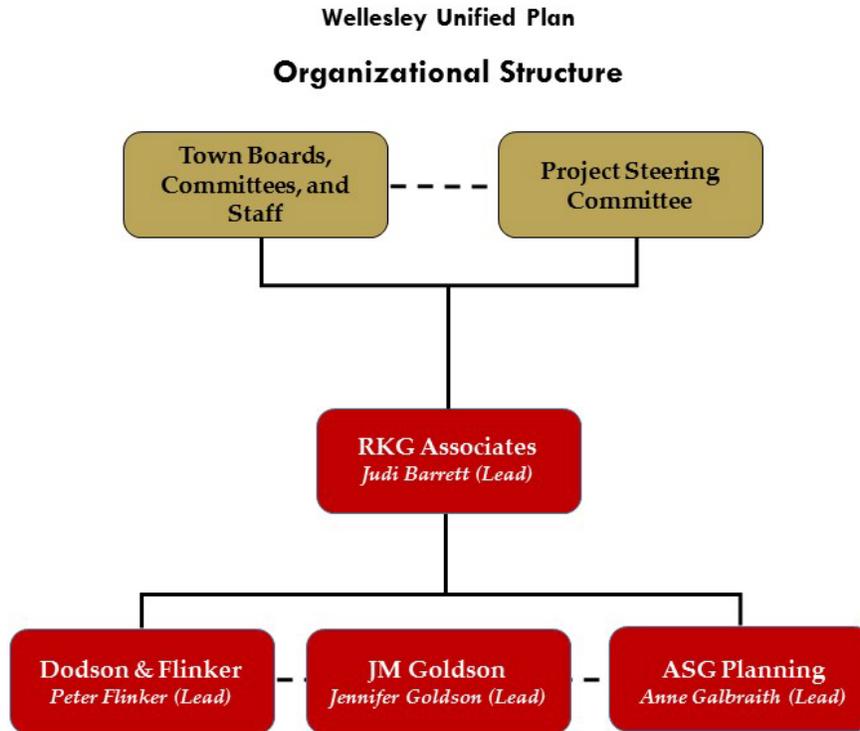
Community Participation

The RKG Team includes seasoned professionals with many years of experience designing creative, effective public participation programs. We are highly skilled at helping our clients reach both local "activists" and those less likely to participate in traditional public meeting venues. An effective public participation process usually involves several modes of outreach and communication, a variety of meeting formats, and activities that inspire residents to remain involved throughout the project. Although public events, powerful graphics, and experienced facilitators are very important, effective public participation requires much more. Some people will want to participate actively and frequently in the Unified Plan process, but many others – perhaps most – will find it difficult to make a consistent or long-term time commitment. As a result, planning for public participation needs to account for different lifestyles and interests as well as competing demands on the lives of Wellesley residents. It also should capitalize on the presence of established community networks to "get the word out," such as email lists maintained by neighborhood associations, the school department, and others. A process that makes information available and easily accessible, welcomes people to participate, and makes participation as "user friendly" as possible will go far to make the Unified Plan a unique and engaging experience for everyone.

PROJECT OVERSIGHT

Frequent meetings of the Steering Committee will be important for encouraging public participation, as well as helping to guide the Unified Plan process. Aside from the project management and publicity value of these meetings, it helps to devote some of these meetings – or some time at every meeting – to a discussion of specific planning topics. By posting agendas and topic-focused discussions on the Town's website in advance of each meeting, interested residents will know when to attend a meeting that interests them so they can contribute their ideas. Our proposal assumes that we will prepare for and attend meetings with Steering Committee every four to six weeks (approximately fifteen meetings).

In addition to working closely with the Steering Committee, the RKG Team will remain in close contact and coordination with Town staff tasked with overseeing the day-to-day management of the plan. To ensure consistent and effective channels of communication, Judi Barrett will be the main point of contact for the Team. Judi will interface with the Town staff and the Steering Committee and relay information to the other members of the Team. The graphic on the preceding page illustrates the proposed organizational structure for the Unified Plan.



OUTREACH & CONSULTATION

In our experience, an effective public participation plan promotes collaboration, dialogue, and interaction among residents. Communities have different ways of conducting the work of local government, so the public participation plan needs to be designed in partnership with those who will play a key role in promoting the Unified Plan. Town officials and staff, local boards and committees, business leaders, conservation and recreation groups, neighborhood leaders, developers, and others will play a crucial role in building interest in the process. These individuals and groups are essential to the success of any public participation event because their “buy-in” establishes credibility and reinforces the importance of community involvement.

Following initial discussions with the Steering Committee, we will develop a participation plan which describes the different ways the Team intends to engage the public. In developing the participation plan, we will draw from our experience of past projects, and engage the Steering Committee in a discussion about the types of events, forums, and outreach efforts that work in Wellesley. The process will be designed to ensure effective participation not only for Wellesley’s most engaged residents, but also for people whose concerns and needs are not always addressed adequately in conventional outreach methods. For the Unified Plan process, we expect that the participation plan will include, at minimum, the following components.

- **Topic-Level Assessment Discussions.** Topic-level discussions with local “experts” and other interested people will be a very important part of preparing Wellesley’s UP. These discussions

will be conducted for the UP Core Elements in order to establish an information baseline for the needs, resources, and barriers assessments and an initial exploratory process to articulate goals and actions the Town could take to address community needs (which could also affirm many actions the Town already takes). The term “local experts” should not be interpreted to mean excluding interested people. It simply means that the planning effort should try to capture local experience with a given topic at a very early stage in the process. Town staff and residents who serve as volunteers on various Town boards and commissions have valuable knowledge and it should be tapped to develop foundation pieces of a strategic plan.

- **Town-Wide Workshops.** We will offer up to two town-wide workshop events throughout the Unified Plan process. The first workshop will focus on introducing the project to the public, and having a facilitated discussion about the Town’s vision for the future. The input provided at this first workshop will help the Team formulate the vision statement and goals for the Unified Plan. The second workshop will focus on a presentation of the needs assessment, an articulation of the vision and goals, and an opportunity for the public to engage with the Team around the strategic planning portion of the Unified Plan. We envision a discussion that lays out the opportunities and issues in Town, and provides an opening to solicit ideas and feedback on ways staff, boards, and committees can work collaboratively to implement the vision and goals over time.

USE OF THE INTERNET

- **Project Website.** The growing prevalence and diversity of web-based communications, coupled with increasingly busy and constrained schedules have made technology-based approaches to participatory planning an essential part of any public outreach program. Providing timely information on a webpage dedicated to the UP will encourage the public to participate and keep the planning process active and engaging between public participation events. The RKG Team will set up, populate, and manage a website for the UP throughout the process, at which time the Town can choose to take over the management or migrate important content to a page on the Town’s website. The website will contain at a minimum: an overview of the process, posting of data and documents, a page for public participation activities, an interactive blog, and contact information.
- **Online Surveys.** Surveys should be an important part of the early needs assessment for each component of the plan. Depending on the level of participation and information throughout the UP process, the RKG Team may conduct periodic online surveys (using tools such as Survey Monkey) to reach wider audiences for the needs assessment than the groups that are convened for topic-area assessments. Surveys may be administered during later phases of the planning process too. For example, the online survey helps to reach residents who cannot attend meetings. However, it almost always suffers from some degree of survey bias, so the responses need to be reported in ways that do not give them more statistical validity than is warranted.

OTHER OPPORTUNITIES

We have used these kinds of techniques in other communities and would be pleased to provide them in Wellesley if desired by the Steering Committee.

- Display boards at the library, the entrance to town hall, or other public gathering spots
- Village or neighborhood walking tours and mapping activities, and focus groups

FINAL PHASES OF THE UNIFIED PLAN PROCESS

- **Presentation to Town's Public Bodies.** The RKG Team will present the draft Unified Plan for endorsement at an all boards meeting to be arranged by the Town.
- **Planning Board and Board of Selectmen Approval.** Our team will present the draft Unified Plan at a joint meeting of the Planning Board and the Board of Selectmen for the approval of the Unified Plan. (We assume the Boards will hold a formal hearing for adoption of the Unified Plan, but it is not required).

For any town-wide planning effort, the goal of engaging the public is to help communities develop a clear, realistic vision, evaluate opportunities to achieve it, and debate major policy decisions. Between public meetings, consultants need to apply what they learned from the community to the technical and analytical tasks that the plan requires, and return with information and ideas that help the community progress to the next stage. The interplay of public participation and the consultant's roles as the analyst, technical resource, and facilitator make planning an iterative process. This is how we see the Unified Plan unfolding in Wellesley.

Core Elements: Vision and Goals, Needs Assessment, Desired Long-Term Outcomes

Vision and Goals

The RKG Team will facilitate a town-wide workshop that will lead to the development of a community vision, goals for the Unified Plan, and an initial assessment of potential opportunities to achieve Wellesley's vision for the future. The vision statement will guide a defined set of goals, objectives, and priorities that will be achievable and measurable. Specific details for these workshops and other venues will be presented in the Participation Plan that the Team will develop in concert with the Steering Committee. The visioning and goal setting process will result in a Vision and Goals document to be reviewed by the Steering Committee, as well as residents and other community leaders who will be able to access it on the project website.

In addition to public input, the RKG Team will use information gleaned from the updated needs assessment to help inform the vision and goals document. RKG is proposing to provide an

updated needs assessment that is based on the Wellesley's 2007 Master Plan. The individual elements of the needs assessment are listed below, along with a description of what will be updated as part of this planning process.

Needs Assessment: Land Use

The RKG Team will inventory and analyze existing land uses, development and redevelopment trends, and key characteristics of the built environment in Wellesley. We will supplement data and maps provided in the 2007 Master Plan with updated aerial photographs, Geographic Information System (GIS) maps, previous land use evaluations, and the natural resource inventories assembled for the Natural & Cultural Resources element (which we will work on concurrently with the Land Use element) where applicable. Using the 2007 Master Plan as a resource, the RKG Team will confirm with the Steering Committee and town residents the previously identified locations for growth and preservation in Town. Understanding the land use implications in these areas will help drive the strategic planning recommendations as they pertain to zoning, permitting, town services, and tax implications. For this element of the Needs Assessment, we will update the following information in written, tabular, and graphics formats:

- Analysis of existing land use data (using assessor's parcel data and orthophotos) and existing land use patterns;
- Review and evaluation of Wellesley's existing zoning bylaw (zoning audit);
- Maps of existing conditions and priority development and preservation locations, making note of changes that are likely to occur due to redevelopment;
- Opportunities to align future zoning with the town's goals;
- Opportunities to address regional and state planning goals and policies;
- Local planning and regulatory capacity.

Needs Assessment: Natural & Cultural Resources

The RKG Team will define how Wellesley's natural, historic, and cultural resources work together to create the rich landscape beloved by residents. For each type of resource, we will define both its location and extent as well as the larger pattern of connections that link these resources together into larger functional systems. Understanding and preserving these functional systems is essential to sustaining the Town's landscape over the long term. Toward that end, we will update the current inventory of significant natural resource attributes and constraints within the town, and evaluate policies and strategies to protect and manage them. Since water resources are fundamental to both natural ecosystems and water supplies, we will begin by updating the following inventory of maps:

- Surface water resources: rivers, ponds and streams, with their associated floodplains and water supply protection zones;

- Groundwater resources: aquifers, well heads, and regulated setbacks;
- Wetlands and natural communities connected to the river and stream system;
- Floodplains, including an evaluation of how climate change may change the pattern of hydrology and flooding.

The RKG Team will update maps using a variety of data available from the Massachusetts Geographic Information System (Mass GIS) and other sources, such as:

- Bedrock and surficial geology and soils;
- Vegetation, including native species and invasives;
- Wildlife habitat and movement corridors;
- Biodiversity and Natural Heritage Resources as defined by BioMap2, CAPS and other assessment tools

Our team will also look at natural resource systems that are of particular importance to human health and quality of life, including:

- Farmland and food systems;
- Other environmental concerns and issues identified by the public.

Based on our findings, we will create a series of maps representing a consensus on Wellesley's goals for protecting the natural resources and ecosystems for the future. Based on this inventory and analysis, we will we will develop recommendations, policies and regulations that will allow Wellesley to preserve and enhance the viability of its natural environment.

Like natural resources, historic and cultural resource areas can be thought of as a functional system that needs to be maintained as an intact whole in order to sustain the viability of any one element for the future. To understand and protect these resources, the Team will update the existing inventory and map historically significant areas, buildings, structures and objects, and map out the landscape that unites them. To accomplish this task, we will utilize existing, available data and records, the Massachusetts Historical Commission's MACRIS database, the State Register of Historic Places, and other available sources. We will work with local partners to understand the historic patterns of development that gave way to Wellesley and provided the foundation for the place it is today. The update of this needs assessment will:

- Identify potentially threatened historical and cultural sites and buildings;
- Evaluate existing and future preservation efforts including potential rehabilitation projects, landmark and historic site designations, and other heritage programs and initiatives;

- Review and evaluate the town's existing advocacy, management, and regulatory efforts to protect and enhance these resources;
- Recommend actions and strategies, including proposed changes to existing municipal policies, programs, and regulations, to protect the town's important historic and cultural resources and opportunities to promote them.

Needs Assessment: Transportation and Circulation

Much like Land Use, the Transportation and Circulation element is intertwined with all other elements that provide a community with its physical form. A well-designed, balanced transportation system is a key contributor to a community's quality of life and it has an indelible impact on the location and intensity of residential, commercial, and industrial development. The RKG Team will provide an update to the transportation assessment to help identify the Town's current strengths and weaknesses. We will provide a data update for traffic volumes, crash data, and planned roadway, pedestrian, and bicycle improvements; and the MBTA and Central Transportation Planning Staff (CTPS) for MBTA ridership patterns. We will also take into consideration the future plans of trail connections and other means of transportation that help connect people to all parts of Wellesley. The Team will also work closely with Town staff to understand current transportation needs and assess the effectiveness of transportation funding to meet the needs of the system. This element will contain an update of:

- Existing transportation conditions including a summary of existing deficiencies and conflicts;
- Maps of roadway functional classification, transit, pedestrian and bicycle facilities, as well as existing average daily traffic volumes;
- Connections to the regional transportation system;
- Parking issues;
- Opportunities for upgraded transportation in Wellesley for all users;
- Exploration of ways of increasing alternative modes of transportation.

Needs Assessment: Economic Development

Working with information from the Town, other agencies, and a variety of public and proprietary data sources, RKG will revisit and update the analysis completed in 2007. Although Massachusetts communities were not hit nearly as hard by the Great Recession as other locations across the U.S., updated data will likely show Wellesley's recovery from whatever economic impact occurred. As part of the needs assessment update, RKG will analyze and incorporate the following information in written, tabular, and graphics formats:

- General economic indicators such as population, comparative education levels, per capita income, existing labor market and labor shed, unemployment, tax base growth, and real estate sales trends;
- Employment base analysis: growth and change in local employment over time, industry strengths and weaknesses, and trends in Wellesley compared with the surrounding region;
- Regional and state economic trends and initiatives;
- Existing land and building space available for economic development and the best-suited businesses to these properties considering compatibility with adjacent uses;
- Adequacy of existing infrastructure and potential for expansion;
- Impact of state and other public and non-profit facilities, institutions, and lands;
- Impact of local regulations and policies on various types of economic development;
- Local capacity to carry out economic development.

Needs Assessment: Housing

For this element of the plan, RKG will review and update data reflecting the current housing inventory, development characteristics, residential development trends, and the most innovative techniques (“best practices”) being used regionally and throughout the Northeast to meet the needs of a variety of households at all market levels. Since Wellesley is current below the 10 percent statutory minimum under Chapter 40B, the Town should consider how to provide additional affordable housing to meet any community needs it may have. As part of the updated housing element, the Team will provide the following content in written, tabular, and graphics formats:

- General housing and household trends, household and family incomes, tenure, housing age, and housing costs;
- Residential development trends;
- Existing and future housing needs, considering the Town’s housing stock and zoning requirements, along with regional demographic and development trends;
- Existing affordable and fair housing policies and implementation framework;
- Zoning and non-regulatory barriers and opportunities to meet housing needs, preserve neighborhood character, and achieve other goals;
- Opportunities to provide for a variety of housing and mixed uses in specific locations across the town;
- Local capacity for housing planning, policy, and implementation.

Needs Assessment: Open Space and Recreation

Building on the recent data and policies generated by the 2015-2022 Open Space and Recreation Plan, the RKG Team will work to understand current patterns of open space and evaluate how well the Town is succeeding in protecting its natural and cultural resources. We will identify additional lands needed to protect Wellesley's water supply and coordinate aquifer protection efforts with future water needs. We will define gaps in the conservation of wildlife habitats and corridors, farmland and other natural resources that may be threatened by development. While the state's open space plan requirements focus on a precise inventory of individual properties, we will be able to take our work to another level, working with local partners to identify potential greenbelts and greenways that serve to protect key open space resources and link them into a sustainable "Green Infrastructure" network.

In keeping with this focus on sustainability, the Open Space and Recreation element will identify the recreational system that needs to be protected, enhanced, and maintained in order to provide for Wellesley's current and future recreational needs. We will begin by mapping out existing parks, ball fields and other recreation areas and working with the public to identify additional needs. We will identify potential locations for additional recreational fields and other desired facilities. We will also think about how people get to these sites – by foot, bike and car – and identify bike routes, off-road paths, hiking trails, and even sidewalk networks that residents use for recreation. Finally, we will work with residents to map out a future recreational system that connects every neighborhood, parks, ball fields and conservation areas with a network of bike paths and pedestrian routes. This element will present and analyze the following information in written, tabular, and graphics formats:

- Inventory and description of existing open space and outdoor recreation resources;
- Utilization of existing open space and outdoor recreation areas, e.g., analysis of data from the recreation department and other sources;
- Assessment of community and neighborhood-level open space and outdoor recreation gaps;
- Opportunities to protect additional open space and develop (or redevelop) outdoor recreation facilities.
- Local policy, program, and implementation capacity.

Needs Assessment: Public Services and Facilities

The RKG Team will work closely with Wellesley's department heads and staff to inventory municipal and school facilities and prepare estimates of existing and future need, considering current conditions and development and demographic trends. For this element, we will review the Town's Capital Improvements Plan (CIP), conduct public facility site visits, and interview Town departments, the Finance Committee, other town boards, and community organizations that routinely use public buildings to assess the adequacy and effectiveness of existing programs and facilities as well as anticipated future needs. We also will review potential buildings and lands

that may be used to fill these needs. The Team understands the direct connection between land use decisions and the impact those have on facilities and services provided by the Town. This is a key piece of both the needs assessment and the strategic plan element of the Unified Plan.

The Team anticipates this element will contain an updated inventory and assessment in written, tabular, and graphics formats in order to consider the following:

- Inventory of existing public facilities and community services provided by the Town;
- Location, land uses, and populations served by various facilities and services;
- Frequency of use (if applicable);
- Sustainability policies and programs currently in place in public buildings and other town facilities;
- Operating costs, preventive maintenance policies and practices, asset management policies, and capital improvements plan (CIP), as applicable;
- Use of technology across Town departments (including the schools);
- Major deficiencies in meeting current demands for services, including adequacy of meeting spaces in a variety of sizes and status of compliance with the Americans with Disabilities Act (ADA) of 1990, as amended;
- Projected types, location of facility, and service improvements based on growth patterns;
- Opportunities to address existing and future needs for facilities and services.

Needs Assessment: Sustainability

Sustainability should play a fundamental role in the shape and direction of each element in the needs assessment and the associated recommendations in the Unified Plan. The RKG Team's approach for discussing sustainability practices is to incorporate them directly into each of the needs assessment chapters and thread discussions of environmental, fiscal, and social sustainability throughout the Unified Plan. Measures and indicators of sustainability will be based on the Town's current policies around the following:

- Existing sustainability policies and practices, e.g., energy conservation measures in public facilities;
- Energy audits (if any) conducted within the past three years.
- Use of alternative energy sources, which may include wind, solar, geothermal, and fuel cells, and identify potential funding sources;

- Options for rainwater harvesting and stormwater management and reuse to minimize impact on stormwater and sewer piping and pumping systems, and conserve potable water use.
- Technical assistance resources for commercial and residential property owners;
- Existing water management policies and practices, review consumption trends, and provide recommendations as appropriate;
- Opportunities to promote and expand sustainable business practices in Littleton;
- Opportunities to increase community participation and efficacy for marginalized and transportation-disadvantaged populations, e.g., the elderly, youth, and people with disabilities.
- Fiscal capacity and reserve funds for unexpected expenditures, increases in service delivery costs, and the ability to undertake longer-term capital improvement projects.

ISSUES AND OPPORTUNITIES

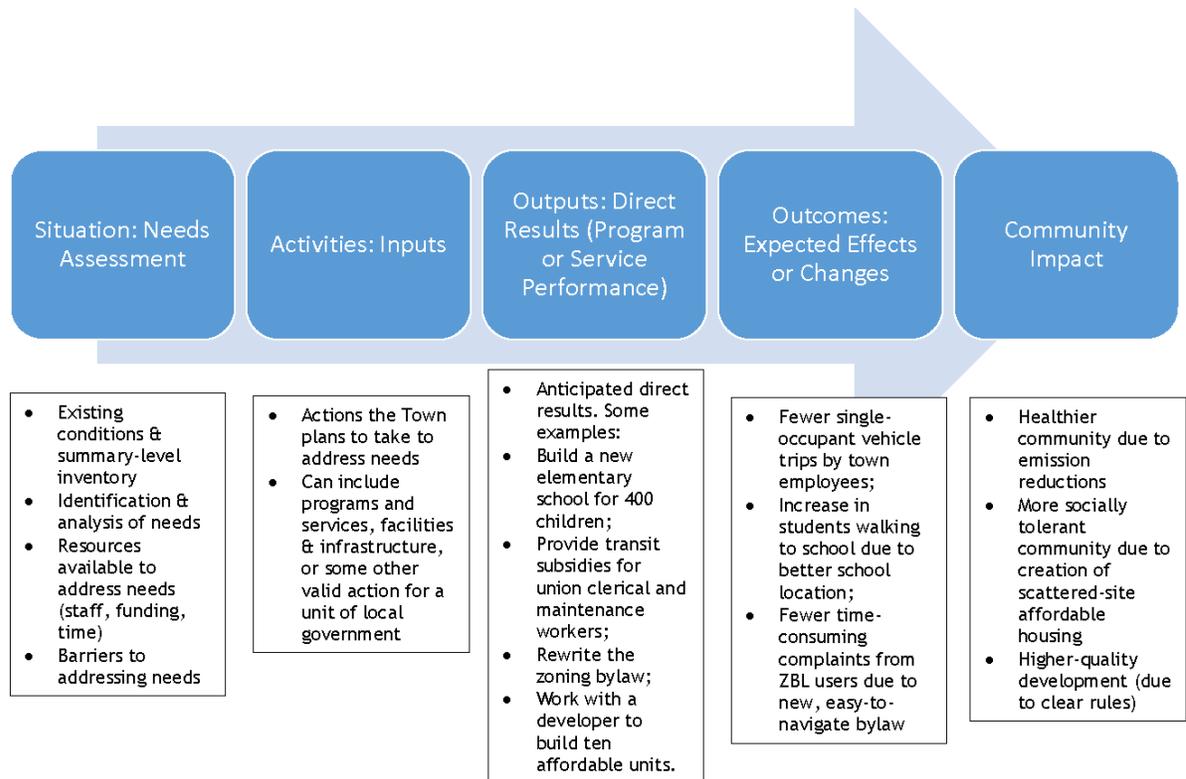
As part of each needs assessment, the RKG Team will compile a set of issues and opportunities to be explored further with the Steering Committee and the public. These items, once agreed upon, will become the basis for recommendations and strategies that will address the issues and explore opportunities. The strategic plan component of the Unified Plan will use these issues and opportunities to determine how best to address them with the resources the Town currently has in place, and identify where there are insufficient financial, regulatory, physical, and/or staffing resources.

Strategic Plan Framework & Plan Implementation

The strategic planning process will produce a shared vision, capacity and needs assessments, and an assessment of the roles of the various Town boards, commissions, and departments, as well as functions that could be shared with other organizational or institutional partners. The strategic plan will set priorities and identify strategies to achieve the community vision and conclude with a well-defined implementation section.

The RKG Team is proposing to create a logic model to help the Town's Boards and Committees understand the recommendations that will lead to the successful implementation of the community's vision. A logic model is set within a graphic or tabular format and shows the relationship between the input (in this case, recommendations), activities to be undertaken to achieve successful outcomes, a way to measure success, and the change that should result from the recommendation. The Team will provide a logic model for each one of the core elements in the needs assessment. The backup documentation for the models would be in traditional narrative formats with accompanying charts, tables, maps, etc.

The logic model approach provides a format that can be easily printed, posted, included in other documents, and referred to as the Unified Plan is implemented over time. The recommendations can also be broken down into short- and longer-term time periods to highlight importance, timeliness, or actions that should be undertaken in the immediate future. An example of a logic model approach can be seen in the figure below.



The Plan

- **Draft Plan.** The RKG Team will produce a Draft Unified Plan for review and feedback. The plan will include both the needs assessment and the strategic plan component in a concise, visually pleasing format. The report will include an Executive Summary and a technical appendix with data, statistical analysis, and other documentation. The Draft Unified Plan Executive Summary will be distributed broadly and available online. The complete Plan will be available for download from the project website and linked from the Town’s website.
- **Final Plan.** Following the necessary public hearings and endorsement process, the RKG Team will produce the Final Unified Plan, responding to comments received during the hearing process as directed by the Steering Committee, Planning Board, and Board of Selectmen. The final Unified Plan will largely follow the format of the Draft Unified Plan.

As discussed earlier, RKG will assist the Steering Committee with presentations to public bodies, the Planning Board, and the Board of Selectmen.

Deliverables

The RKG Team will create the following deliverables consistent with the requirements of the Unified Plan RFP:

- A work/action plan to achieve the mandate of the RFP;
- Project Schedule - including suggested regular meetings dates and status reports to keep the project on task and keep identified stakeholders apprised of the process;
- Orientation / training of the Steering Committee and participants to the process and components of strategic planning, referencing the other Plans and studies to provide a solid framework for the UP;
- Community input - including gathering of stakeholder information and input as well as using appropriate methods of communication and engagement;
- Needs assessment– reviewing existing plans and documents pertinent to the UP, identifying trends and patterns that are applicable, analyzing strengths, weaknesses, opportunities and threats;
- Organization and facilitation of public meetings to disseminate and gather information relevant to the process;
- Process and Meeting Facilitation - assisting discussion and decision-making and ensuring that conversations are positive, forward-looking and action-oriented to move the participants towards creating a shared future;
- Coordination and preparation of minutes of all meetings, including community/employee consultation sessions and distribution to the Steering Committee and meetings with Public Bodies and Staff; and
- Plan documentation, including development of an Implementation Plan and Final report for the project, including Executive Summary.

Anticipated Project Schedule

RKG’s proposed project schedule assumes a seventeen- to nineteen-month performance period, including the presentation to the Wellesley Board of Selectmen and Planning Board. The schedule below presents our estimated timeline for completing the work described in our proposal.

WELLESELY UNIFIED PLAN

Project Component/Task	Project Timeline (Months)																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
A. Getting Started																		
Kickoff & Tour	█																	
Review of Past Plans, Studies	█																	
Participation Plan	█	█																
B. Community Participation																		
Steering Committee Meetings (Project Oversight)	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
Project Website/Branding	█																	
Group Interviews		█																
Town-Wide Meetings					█							█						
C. Core Elements																		
Vision & Goals (Discussion Document)					█	█												
Land Use				█	█													
Natural & Cultural Resources				█	█													
Transportation				█	█													
Economic Development					█	█												
Housing					█	█												
Open Space & Recreation						█	█											
Public Facilities & Services							█	█	█									
Strategic Planning								█	█	█	█	█	█					
Implementation Program												█	█	█	█			
D. The Plan																		
Draft Plan																	█	
All Boards Meeting																		█
BoS & PB Meeting																		█
Final Plan																		█

Our Experience & Qualifications

RKG Associates, Inc.

Groton Master Plan | Groton, Massachusetts (2011; 2013)

RKG Associates, Inc. completed an update of the Groton Master Plan in 2013. The master plan covered all of the core elements required under G.L. c. 41, § 81D, but also included a “phase 2” zoning process to implement the priority land use recommendations of the plan. These recommendations included replacing Groton’s single Business district with individual business districts tailored to the location and form of the areas zoned for commercial uses along Route 119 and in West Groton. Judi Barrett assisted the Groton Land Use Department and Planning Board by drafting these and other zoning recommendations, including a new Site Plan Review bylaw, updating the Table of Use Regulations, and associated “clean-up” of the definitions section. In 2015, Groton Town Meeting adopted all of the new business districts.

(Note: this project was substantially carried out under Judi Barrett’s leadership while she was employed at Community Opportunities Group. She finished the zoning implementation work and prepared a Housing Production Plan for Groton in 2013, after joining RKG Associates.)

Arlington Master Plan | Arlington, Massachusetts (2015)

RKG Associates led a team of consultants that worked with the Arlington Planning Department and a large master plan steering committee to create a new master plan for the Town. The planning process in Arlington called for extensive outreach, online surveys, several large public events, multiple stakeholder meetings (similar to the core element topic meetings proposed for Littleton), and a sophisticated land use, design, and economic analysis of development opportunities along Massachusetts Avenue, Broadway, and an older light industrial area where the land uses have clearly begun to evolve. The Master Plan includes a detailed implementation plan with regulatory and non-regulatory actions programmed over a ten-year period.

See Plan: <http://www.arlingtonma.gov/departments/planning-community-development/master-plan>

Workforce Housing Needs Assessment | Nantucket, Massachusetts (2015)

Housing Nantucket, a non-profit housing advocacy organization on Nantucket, hired RKG Associates to analyze the housing needs of year-round workers. The project was funded by a consortium of public agencies and private organizations. The study process called for extensive data collection and analysis; numerous stakeholder meetings; GIS analysis of housing patterns, tenure, and race; and an assessment of the longer-term seasonal and year-round housing trends that contributed to the present housing crisis on Nantucket. RKG produced a widely acclaimed report about the competition between year-round and seasonal workers for the same inadequate supply of housing and the need to reconcile tensions between Nantucket’s housing and open space/conservancy groups. The study addresses affordable and fair housing problems on Nantucket, recommends new zoning tools and creative use of Chapter 40B to increase the island’s housing supply, and calls on the island’s larger employers to update and improve their employer-assisted housing efforts. As a result of this project, the Town of Nantucket has hired RKG to

prepare a Chapter 40B Housing Production Plan, and RKG has also been retained by Nantucket Cottage Hospital to help them develop a more effective, equitable employer-assisted housing strategy. In addition, RKG's report was used extensively to build support for rezoning land in the "mid-island" area for 350 mixed residential units, including 25 percent affordable units. The zoning passed almost unanimously at town meeting on November 9, 2015.

See Plan and Public Presentation: <http://www.housingnantucket.org/resources.html>

Tewksbury Master Plan | Tewksbury, Massachusetts (2016)

The Tewksbury Community Development Department hired RKG Associates to finish an update of the Town's 2003 Master Plan that includes three sections (elements) prepared mainly by the regional planning agency. RKG was responsible for designing and carrying out the public participation process, helping the Town develop a vision statement and master plan goals, creating the implementation program, and updating the 2003 plan as well as elements the regional planning agency had begun to update a few years earlier.

Following completion of the master plan update, the Town of Tewksbury has brought RKG Associates back to complete a recodification and update of the Tewksbury Zoning Bylaw.

Dodson & Flinker

Cross & Vitti Neighborhood Study | New Canaan, Connecticut (Current Project)

Dodson & Flinker is leading a team to create a masterplan and implementation strategies for a key area on the edge of New Canaan's historic downtown. Beginning with stakeholder interviews and an internal workshop, the process will culminate with a town-wide charrette designed to build consensus in support of changing the area from an automobile-dominated area to a pedestrian-friendly district with a mix of residential and commercial uses.

Master Plan Update | Kingston, Massachusetts (Current Project)

As part of a larger team, Dodson & Flinker is providing GIS analysis and facilitation to help the town design a green infrastructure system and locate appropriate centers for mixed use development. At a multi-day charrette, the firm helped to create conceptual masterplans for each center showing how to accommodate growth while retaining the livability and small-town charm beloved by residents. A variety of future growth scenarios were explored with plans and perspective drawings, allowing residents to visualize alternatives for the future.

Turner's Falls Downtown Livability Plan | Montague, Massachusetts (2013)

Dodson & Flinker won a 2013 Planning Award from Massachusetts APA for this visionary plan for downtown Turner's Falls, the historic center of Montague, Massachusetts. A variety of future growth and redevelopment scenarios were explored through a series of four Working Group meetings where stakeholders defined opportunities for redevelopment and developed a clear action strategy for implementation. The centerpiece of the process was a public design charrette where participants circulated among a series of stations devoted to separate themes of streetscape

improvements, economic revitalization and marketing, parks and open space, historic preservation, etc.

North 40 Visioning | Wellesley, Massachusetts (2014)

The town was caught off-guard in Spring, 2014 when Wellesley College announced it would sell “the north 40” to the highest bidder. A 46 acre parcel across the railroad tracks from the main campus, the area has served as de-facto open space for the surrounding neighborhood for more than a century. Dodson & Flinker led a series of public visioning workshops to explore options for town purchase and use of the parcel, and followed up with design studies showing how various uses such as housing, a school, recreation fields and community gardens could be incorporated into future use of the site. Based on the results, the town successfully negotiated a \$35 million deal to purchase the property in December 2014.

Merrick Recovery Plan & Form Based Code | West Springfield, MA (2011)

In June 2011, a rogue tornado barreled across western Massachusetts, touching down in the historic Merrick District of West Springfield. Out of the devastation arose the opportunity to address long term planning and zoning issues that have long hampered rehabilitation and development. Dodson & Flinker led a series of public meetings to help the community identify valuable existing development patterns and to propose zoning changes that would encourage context sensitive redevelopment. Our work included neighborhood and streetscape analysis, a community masterplan, illustrated form-based zoning code and a final report.

RhodeMapRI Statewide Sustainability Plan | State of Rhode Island (2014)

Dodson & Flinker joined a team of planners, engineers and economists to craft a statewide plan for sustainable development under an \$1.9 Million HUD grant. The firm led a series of 24 workshops in six regions designed to involve stakeholders in defining priorities for conservation of natural and cultural resources, as well as to identify existing and potential growth centers. The firm designed an innovative “growth centers game” to help non-planners understand complex planning issues and work on regional solutions to issues of economic development and connectivity.

JM Goldson

Community Preservation Plan | Manchester-by-the-Sea, Massachusetts (2015)

The Town of Manchester-by-the-Sea contracted JM Goldson to prepare a Community Preservation Plan in January 2015 to guide the allocation of Community Preservation Act (CPA) funds for fiscal years (FY) 2016-2020. To help identify community priorities for use of the CPA funds, the Community Preservation Committee sponsored a community workshop designed and facilitated by JM Goldson. The workshop was highly interactive and included digital group polling and a small discussion group exercise called “CPA Tetris,” a consensus-building visual prioritization exercise developed by JM Goldson. Through this planning process, the CPC identified its overarching mission and ways to utilize the roughly \$400,000 per year the Town collects in CPA funding.

Brookline Housing Production Plan | Brookline, Massachusetts (2016)

JM Goldson, on a team with the Metropolitan Area Planning Council that was led by RKG Associates, prepared the Town of Brookline Housing Production Plan in 2016. JM Goldson's role was to conduct a development constraints analysis, prepare infographics, as well as design and facilitate an extensive public engagement process that entailed twelve focus/working group meetings and four community workshops. Through four community workshops that JM Goldson designed to build upon the prior workshop, community members participated in a variety of engagement and discussion exercises to help direct the goal and strategy recommendations of the plan. JM Goldson's engagement methods included interactive digital group polling, open house-style exercises, and world-cafe style small group discussion exercises.

Concord Housing Production Plan | Concord, Massachusetts (2015)

JM Goldson prepared the Town of Concord Housing Production Plan in 2010 as well as the Plan's update in 2015 with the Regional Housing Services Office. The town's housing goals and strategies included in the 2015 update are aimed primarily at continuing to expand the diversity of housing options in Concord, including affordable housing, housing to support aging in the community, and housing to strengthen the Town's ability to achieve other interrelated community goals, including goals for sustainability and economic revitalization of its village centers. JM Goldson led the development and analysis of the online survey and designed and facilitated the community workshop, which included digital group polling and small group discussion exercises.

ASG Planning

Beyond Boston: Statewide Transit Performance Study | Massachusetts (2012)

In order to comply with Massachusetts transportation reform legislation, MassDOT implemented 10 key strategic initiatives, including *Beyond Boston*. This study was a cooperative effort between MassDOT and the state's 15 RTAs to increase institutional transparency and accountability, meet regional transportation needs, and more effectively deliver public transportation. *Beyond Boston* also addressed the relationship between the MBTA and neighboring RTAs, finding opportunities for greater collaboration and mechanisms for streamlining the management of public transportation assets. As part of this project, ASG Planning analyzed this data for several of the RTAs, highlighting "best practices" within the Commonwealth, as well as potential issues and areas for improvement. This included improving capital planning, developing service standards, improving collaboration among MassDOT and RTAs, and developing a more effective funding process.

Development of RIPTA Strategic Plan | Rhode Island (2011)

RIPTA's Board of Directors identified the need to develop a strategic vision for the Authority and created a special subcommittee to prepare a long term strategic plan. ASG Planning was tasked with supporting this Board subcommittee and developing a Strategic Plan. ASG Planning served as staff to RIPTA's Board Subcommittee on Strategic Planning over a one-year period, leading

efforts to identify current issues, challenges and opportunities related to the delivery of statewide transit service and other RIPTA programs. Five specific topic areas were considered that included existing operations, challenges and opportunities, visioning and goal setting, objectives and actions, and funding needs.

Our References

The following references may be contacted about the RKG staff assigned to Wellesley's UP or about our subcontractors. Since several of our references have experience with more than one member of RKG's UP Team, we have indicated in italics the team member(s) for each associated project and contact person.

Project: Groton Master Plan (2011; 2013)

Michelle Collette, AICP, Land Use Director

Groton Town Hall

173 Main Street

Groton, Massachusetts 01450

Phone: (978) 448-1105

Email: mcollette@townofgroton.org

**Ms. Collette is a reference for Judi Barrett, RKG Associates, and Peter Flinker, Dodson & Flinker. Ms. Barrett led the Groton Master Plan project and completed all of the Phase I implementation services: zoning revisions and an affordable housing plan for the Town of Groton. Dodson & Flinker served on the master plan team and wrote the design guidelines for the Groton town center overlay district.*

Project: Lincoln Comprehensive Plan (2009)

Timothy Higgins, Town Administrator

16 Lincoln Road

Lincoln, MA 01773

Phone: (781) 259-2604

Email: higginst@lincolntown.org

Note: this plan received the Outstanding Comprehensive Plan Award from the Massachusetts Chapter of the American Planning Association (APA-MA) in 2010.

(Other projects completed for the Town of Lincoln: At-Risk Properties Study (2007); Healthy Communities Plan (2010); and Community Center Feasibility Study (2012).)

**Mr. Higgins is a reference for Judi Barrett, RKG Associates, who led the Lincoln Comprehensive Plan process.*

Project: Falmouth Housing Demand Study and Needs Analysis (2014)

Brian Currie, AICP, Planning Director

59 Town Hall Sq.

Falmouth, MA 02540

Phone: 508-495-7440

Email: planning@falmouthmass.us

Note: This plan received an Outstanding Project Planning Award from Mass. APA in 2014.

**Mr. Currie is a reference for Judi Barrett, RKG Associates.*

Project: Town of Easton; Queset Commercial District Planning & Zoning (2015)

David Colton, Town Administrator
Gary Anderson, AICP, Planning Director
136 Elm Street
Easton, MA
Phone: (508) 230-0500
Email: DColton@easton.ma.us
Email: GAnderson@easton.ma.us

**Mr. Colton and Mr. Anderson are references for Judi Barrett, RKG Associates.*

Project: Tewksbury Master Plan (2003; Update, 2015)

Steven Sadwick, AICP, Community Development Director
999 Whipple Road
Tewksbury, MA 01876
Phone: (978) 640-4370
Email: ssadwick@tewksbury-ma.gov

**Mr. Sadwick is a reference for Judi Barrett, RKG Associates.*

Project: Downtown Turners Falls Livability Plan (2013)

Walter Ramsey, Town Planner and Conservation Agent
One Avenue A
Turners Falls, MA 01376
Phone: (413) 863-3200, ext.112
Email: planner@montague-ma.gov

**Mr. Ramsay is a reference for Peter Flinker, Dodson & Flinker.*

Project: Kingston Master Plan (Current Project)

Thomas Bott, AICP, Town Planner
Kingston Town House
26 Evergreen Street
Kingston, MA 02364
Phone: (781)585-0549
Email: tbott@kingstonmass.org

**Mr. Bott is a reference for Peter Flinker, Dodson & Flinker. Mr. Bott is also a reference for Judi Barrett, who completed the Town's affordable housing plan in 2013.*

Project: Brookline Housing Production Plan (Current Project)

Joe Viola, Assistant Director for Community Planning
333 Washington Street
Brookline, MA 02445
Phone: 617-730-2125
Email: jviola@brooklinema.gov

**Mr. Viola is a reference for Jennifer Goldson, JM Goldson. Mr. Viola is also a reference for Judi Barrett, who is leading the Town's Housing Production Plan process.*

Project: Community Preservation Plan (2015)

Sue Brown, Town Planner
10 Central Street
Manchester-by-the-Sea, MA 01944
Phone: 978-525-6436
Email: browns@manchester.ma.us

**Ms. Brown is a reference for Jennifer Goldson, JM Goldson.*

Project: Housing Production Plan (2015)

Marcia Rasmussen, Director
141 Keyes Road, First Floor
Concord, MA 01742
Email: mrasmussen@concordma.gov
Phone: 978-318-2390

**Ms. Rasmussen is a reference for Jennifer Goldson, JM Goldson.*

Project: Community Vision (2016)

Stephen Shatz, Selectman
50 Main Street
Stockbridge, MA 01262
Phone: 413-298-4170 ext. 250
Email: stephenshatz@gmail.com

**Mr. Shatz is a reference for Jennifer Goldson, JM Goldson.*

Project: RIPTA Strategic Plan

Amy Pettine, Executive Director of Planning
705 Elmwood Avenue
Providence, RI 02907
Phone: 401-781-9400
Email: apettine@ripta.com

**Ms. Pettine is a reference for Anne Galbraith, ASG Planning.*

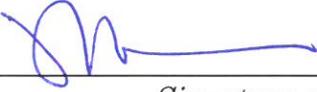
Proposal Certifications

CERTIFICATE OF TAX COMPLIANCE

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

020357052

*Social Security Number or
Individual or
Federal Identification Number*



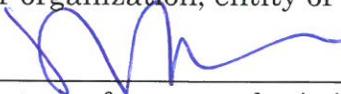
*Signature of
Corporate Name*

RKG ASSOCIATES INC.
*Corporate Officer
(if applicable)*

APPENDIX B – REQUIRED FORMS

CERTIFICATE OF NON-COLLUSION: REQUIRED FORM

The undersigned certifies under the penalties of perjury that this bid or bid has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word “person” shall mean any natural person, business partnership, corporation, union, committee, club or other organization, entity or group of individuals.



Signature of person submitting contract/bid

7-19-16

Date

RKG Associates, Inc.
Name of Business

Project Team Resumes

RUSSELL A. ARCHAMBAULT, VICE PRESIDENT & MANAGING PRINCIPAL

PROFESSIONAL PROFILE

Mr. Archambault joined RKG Associates, Inc. in 1994, and has over 26 years experience in community and economic development, economic and fiscal impact analysis, real estate market research, and development feasibility analysis. Since joining RKG Associates, Inc., Mr. Archambault has applied his background to managing numerous projects throughout the US in areas of urban and water-front redevelopment, development feasibility, local and regional economic analysis, military base reuse planning, and transportation economics. Mr. Archambault has also lead the development of RKG Associates' fiscal planning expertise, which assists local governments in understanding the municipal service impacts of local land use decisions and policies. Mr. Archambault is a national speaker on issues of urban redevelopment and fiscal planning.

Before joining RKG Associates, Mr. Archambault was Assistant Director of Community Development for the City of Laconia, New Hampshire and also served as project manager for the Virginia Tech Economic Development Assistance Center in Blacksburg, Virginia. Mr. Archambault is managing partner of RKG Associates' Alexandria, VA office.

EDUCATION

- Bachelor of Science, Public Management, Plymouth State University, Plymouth, NH
- Master of Urban and Regional Planning, Virginia Poly-technic Institute and State University (Virginia Tech), Blacksburg, VA

PROFESSIONAL AFFILIATIONS

- International Economic Development Council (IEDC)
- American Planning Association (APA)
- Virginia Chapter of the American Planning Association (VAPA)
- Virginia Economic Developers Association (VEDA)
- Virginia Downtown Development Association (VDDA)
- National Main Street Program
- National Building Museum, Washington DC
- Northern New England Chapter-APA-Executive Committee
- Northeastern Industrial Developers Association (NIDA)
- New Hampshire Planners Association (NHPA)
- PLAN NH, Past Vice President

RELEVANT PROJECT EXPERIENCE

Housing Market Analyses

Green Impact Zone Residential Market Analysis Kansas City, MO

Mr. Archambault was retained by the newly formed

Green Impact Zone organization to assist in the creation of a residential development strategy in Kansas City's urban core. As part of a public/private initiative funneling more than \$150 million in new road, green energy and infrastructure investment, the most essential element of the Green Impact Zone was to reverse the out-migration of residents from a blighted 105-block area. Mr. Archambault conducted a residential market study to identify the most likely market segments to capture in the study area, both market rate and subsidized units.

Alexandria Housing Master Plan, Alexandria, VA

Mr. Archambault managed the preparation of a citywide housing master plan for the City of Alexandria, VA. Mr. Archambault facilitated a public engagement process to educate and inform City residents and housing officials on the projected affordable housing needs of the City over the next 20 years, including special needs groups. The plan was the City's first comprehensive examination of its affordable housing supply.

Pittsburgh Citywide Housing Strategy, Pittsburgh, PA

Mr. Archambault was retained by the City of Pittsburgh to conduct an analysis of the City's residential market and to analyze the supply and demand for future public housing. Mr. Archambault analyzed housing in the City's 94 neighborhoods and conducted a review of the Pittsburgh Housing Authorities public housing portfolio, which was experiencing very high vacancy due to poor management and maintenance. Based on RKG's research findings, Mr. Archambault was able to assist the PHA in repositioning its public housing inventory and identified opportunities to revitalize the City's most disadvantaged communities.

Bowling Green Downtown Housing Analysis Bowling Green, KY

The Downtown Bowling Green Redevelopment Housing Analysis was commissioned by the City of Bowling Green to analyze local housing development opportunities in the City's downtown redevelopment district. Mr. Archambault directed the analysis, accounting for both market rate and subsidized housing. The report also included an assessment of the supply and demand for home ownership opportunities.

Morgantown City-wide Housing Strategy Morgantown, WV

RKG Associates was retained by the Fairmont-Morgantown Housing Authority to prepare a citywide housing study. Mr. Archambault directed an in-depth analysis of the City's residential housing market and the surrounding region. This study analyzed the supply and demand for housing relative to the availability, affordability, and condition of the housing stock. The impacts and demands from West Virginia University

students and faculty were also considered in this analysis.

Fairmont City-wide Housing Analysis, Fairmont, WV

Mr. Archambault directed the preparation of the City of Fairmont Housing Market Analysis. The study contains an analysis of historic, current, and projected housing trends, and the analysis identified future opportunities for growth and development within the local market.

Residential Development Strategy, Blacksburg, VA

RKG Associates was retained by a local residential developer to analyze the need for additional market-rate, student, and affordable housing over the next 10 years. Mr. Archambault directed the supply and demand analysis and estimated the demand for affordably-priced housing. The analysis also included a development site screening analysis, which identified 10 potential locations for new housing development. In addition, Mr. Archambault prepared a 10-year business and development strategy for the developer Market and Development Feasibility Studies.

**Downtown Trenton Waterfront Redevelopment
Trenton, NJ**

Mr. Archambault led a planning and design team of consultants to assist the City of Trenton with a redevelopment project that will transform 33 acres within the downtown district. Mr. Archambault is analyzing the market and development feasibility of creating a large mixed-use project on what is currently state office parking lots. An existing downtown highway (Route 29) will be relocated from the edge of the Delaware River into the downtown in the form of an urban boulevard, which will create new private development opportunities on each side of this new road. Once completed, Mr. Archambault will market the plan to the private development community to create: mid-rise urban residential, hotel, Class A office, and urban entertainment uses.

Millville Downtown Renaissance, Millville, NJ

Mr. Archambault provided market and feasibility support for the creation of the Downtown Renaissance Plan for Downtown Millville, NJ. This city of 25,000 pop. located between Philadelphia and Atlantic City desired to undertake a multi-phase, waterfront redevelopment strategy that would introduce urban infill housing, office development, open space/recreation, live/work artist space, and hospitality facilities to the downtown. The City is currently moving forward with the project team's recommendations and is trying to secure developer interest in a new downtown hotel and restaurant.

**Downtown Redevelopment Commercial Market
Analysis, Bowling Green, KY**

A redevelopment market study was commissioned by a local developer to examine the market potential of

various commercial development opportunities in Downtown Bowling Green, KY. Mr. Archambault directed a supply and demand analysis for a hotel and conference facility, retail/service uses, office space, and downtown residential. With RKG's assistance, the developer received a City commitment for \$12 million in municipal bond financing.

**Courthouse Square Redevelopment Market Feasibility
Analysis, Arlington County, VA**

RKG Associates was retained by Arlington County (VA) Economic Development to examine the market feasibility of a previously approved site plan for a 3-block urban center. Mr. Archambault directed an analysis of market segments including: (1) high-rise office, (2) retail, and (3) full-service hotel. This study was the impetus for the County to solicit developers to create a dynamic civic space in the center of Arlington.

**Feasibility Analysis of Adaptive Reuse of Renovators
Supply Mill, Irving, MA**

Mr. Archambault evaluated the market and financial feasibility of the Franklin County (MA) Community Development Corporation's acquisition of a 250,000 SF mill facility from a private owner. The analysis indicated a lack of regional demand for mill space and the project's inability to generate a viable revenue stream in order to maintain, operate, and market the facility.

**Bound Brook Transit Orient Development Market
Analysis, Bound Brook, NJ**

Working with a local developer and urban design firm, RKG Associates, Inc. prepared a downtown real estate market study for this community. The study examined market opportunities in the areas of high density residential, niche retail, office, hospitality, education, and transit village development. The client was acting as a "preferred developer" for the Borough of Bound Brook following the destruction of the central business district from the flood waters of Hurricane Floyd in September of 1999. The recommendations included the reestablishment of the downtown commercial district around a transit village concept.

**Capitol Hill Towers Tax Increment Financing (TIF)
Feasibility Analysis, Washington, DC**

RKG Associates was retained by the Washington, DC government to review the market and financial feasibility of a proposed \$113 million, mixed-use development in southeast Washington, DC. Mr. Archambault directed and prepared 10-year operating and tax revenue projections, to determine if the proposed project could support the debt service on an \$11.5 million Tax Increment Financing (TIF) package sought by the developer, NJA Development Partnership LC of New York City.

JUDI BARRETT, DIRECTOR OF MUNICIPAL SERVICES

PROFESSIONAL PROFILE

Judi Barrett is the director of RKG's Massachusetts office. Her areas of expertise include planning, zoning, housing and community development, and socioeconomic impact analysis. With over twenty-five years of experience in planning and community development, Judi has worked on a wide variety of engagements: comprehensive plans, housing plans and housing need studies, HUD Consolidated Plans, downtown plans, zoning ordinances and bylaws, development impact studies, and strategic plans. Judi has created innovative, award-winning plans for cities and towns and she is widely respected for her citizen participation work.

Judi manages most of RKG's planning services for local government clients in New England. She is a frequent panelist and guest speaker at professional conferences and a guest lecturer for graduate-level planning students. As Community Development and Housing Committee Chair for APA-MA, she has organized statewide conferences on inclusionary zoning, and she serves as a trainer both for APA-MA and the Citizen Planner Training Collaborative. Judi has led workshops for the APA National Conference and numerous regional conferences as well.

Before joining RKG, she served as planning director for Community Opportunities Group, Inc., and CDBG program manager for the Massachusetts Department of Housing and Community Development (DHCD). She previously worked for the Town of Plymouth (MA) as community development director, where she led highly successful housing, economic development, and tourism programs, including a downtown revitalization initiative.

EDUCATION

- AB in History and Government; Harvard University, Cambridge, Massachusetts
- Graduate coursework in planning, land use law, and public finance at Harvard, Tufts University, and UMass-Boston

PROFESSIONAL AFFILIATIONS

- American Planning Association, and Massachusetts Chapter (APA-MA) Board: Chair, Community Development & Housing Committee
- Massachusetts Association of Planning Directors (MAPD)
- Urban Land Institute (Boston), Housing and Economic Development Product Council

RELEVANT PROJECT EXPERIENCE

Comprehensive Master Plans

Sample Projects: Lincoln, Groton, and Dedham, MA

Judi Barrett has led teams of consultants to prepare master plans for eighteen cities and towns. In each case, she was responsible for coordinating the work of staff and subcontractors, designing and conducting the public participation process, conducting a zoning audit and developing the future land use plan, and taking the lead role in preparing the housing and economic development components of the plan. Her master plans for the towns of Dedham and Lincoln, Massachusetts, won Outstanding Comprehensive Plan Awards from the Massachusetts Chapter of the American Planning Association (APA-MA). For Groton, she worked with the Town through the first phase of zoning implementation, writing new zoning for the business districts and a new Site Plan Review bylaw.

Town Center Planning and Zoning

Sample Project: Needham, MA Needham Center Plan

As subcontractor to an urban design firm, Judi Barrett prepared a feasibility analysis for sample sites and wrote new zoning for redevelopment in Needham Center. The zoning includes incentives for multifamily units over commercial space and incorporates design standards to accommodate the additional density.

Inclusionary Zoning Ordinance

Sample Project: Beverly, MA

Judi Barrett has worked nationally on inclusionary zoning. An example of her success with zoning for

affordable housing is the award-winning inclusionary zoning ordinance that she wrote for the City of Beverly (MA). The ordinance mattered to City officials because Beverly had passed the state's threshold for "mandatory" affordable housing permits (Chapter 40B), so without regulatory reform, the City did not have a way to incentivize affordable housing development. The ordinance provides significant as-of-right cost offsets for developments that include affordable units on site while still creating other avenues for developers to provide affordable housing. The ordinance has been very effective for creating new affordable housing in the downtown and other "smart growth" neighborhood commercial centers.

Comprehensive Zoning Revision

Sample Project: Northborough, MA

Judi Barrett worked with the Northborough Planning Department, Planning Board, and Zoning Board of Appeals on a comprehensive revision of the town's Zoning Bylaw. The project involved over 50 committee and subcommittee meetings, numerous public hearings, and zoning map amendments to align Northborough's land use regulations with many changes that had occurred in the town since the last major zoning revision was done twenty years earlier. The new zoning includes neighborhood development incentives for a variety of housing types and more flexible rules for downtown development. Revisions to the zoning map eliminated "split lot" problems that had discouraged development proposals in the past.

Housing Plans and Studies

Sample Project: Falmouth, MA Housing Demand Study and Needs Analysis

Judi Barrett worked with the Falmouth Planning Department on a comprehensive housing demand study and needs analysis. For this project, she obtained and analyzed a wide range of demographic and market data for the Town as a whole and each of its villages in an effort to identify minority and low-income concentration areas. She also completed a regulatory review and conducted an extensive housing policy and housing development capacity analysis and identified ways for the Town to improve in-house advocacy and project review skills. RKG won a Planning Project Award from APA-MA for Judi's work in Falmouth.

Development Impact Analysis

Sample Project: Hopkinton, MA Legacy Farms

As consultant to the Hopkinton Planning Board and Town Attorney, Judi Barrett analyzed the impact of Legacy Farms, a 940-unit housing development, and assisted with negotiating the terms of a Host Community Agreement (HCA). The project preserved 500 acres of open space and created a mix of housing, including affordable apartments in a town with very expensive homes. It also brought over \$1 million in transportation improvements and development of a new drinking water supply in East Hopkinton. Since negotiating the original HCA, Judi has helped Hopkinton evaluate the financial impact of two changes proposed by the developer.

Development Impact Analysis

Sample Project: Plymouth, MA Plymouth Rock Studios

The Plymouth Town Manager and Planning Department hired Judi Barrett to prepare a comprehensive economic and fiscal impact analysis of Plymouth Rock Studios, a proposed film production studio known locally as "Hollywood East." The project was slated for a 240+/- acre site in South Plymouth. The applicants sought zoning changes and tax relief from the Town, and special financing from the state, in order to lure the film production industry to Massachusetts and capitalize on the state's film production tax credits. Ultimately the project did not proceed due to questionable job creation projections and legal problems involving one of the developers.

Neighborhood Revitalization Strategy Area (NRSA) Plans

Sample Projects: Lawrence, MA; Hartford, CT; Davisville (North Kingstown), RI

From her years of Community Development Block Grant (CDBG) experience, Judi Barrett has developed Neighborhood Revitalization Strategy Area (NRSA) designations for very-low-income neighborhoods in several communities. NRSA approval from HUD (or the state program) allows CDBG grantees to administer eligible housing and community development programs under more flexible national objective requirements, thereby making service delivery strategic and more efficient.

ERIC HALVORSEN, AICP, SENIOR PROJECT ANALYST

PROFESSIONAL PROFILE

Mr. Halvorsen's primary areas of expertise include land use, zoning, transit oriented development, transportation, and public participation. He has over ten years experience in community revitalization and regional planning. His responsibilities include planning services for municipal clients, research and writing, and civic engagement.

EDUCATION

- BS in Environmental Planning and Design; Rutgers University, New Brunswick, New Jersey.
- Masters of City and Regional Planning, University of Illinois, Champaign-Urbana, Illinois.

PROFESSIONAL AFFILIATIONS

- American Institute of Professional Planners
- American Planning Association
- Urban Land Institute
- Young Professionals in Transportation

PROJECT EXPERIENCE

Community Planning

Transit Oriented Development (TOD)

Managed a research and place-based planning program that undertook TOD station area plans in 8 municipalities centered around the MBTA's rapid rail and commuter rail system. The plans included an analysis of the current real estate supply and demand for the neighborhoods surrounding the stations and issues that would influence new development opportunities.

The projects also identified and offered recommendations for addressing regulatory issues in zoning and permitting, as well as transportation connectivity. The resulting plans helped catalyze the construction of mixed-use and multi-family housing developments in several of the communities and spurred successful applications to state programs for investments in key infrastructure projects.

Downtown Revitalization

Prepared a downtown revitalization action and implementation plan for the Town of Framingham, MA which built upon the existing vision established by the community in 2009. The action plan was focused on understanding the market for new development, the challenges of financing

development in Downtown, and addressing the regulatory barriers through significant zoning changes. The process also included a multi-lingual public engagement component with several focus group meeting and a large interactive open house.

Transportation Planning

Managed programs and completed plans for municipal-wide bicycle and pedestrian infrastructure and parking management. Developed specific recommendations for improving multi-modal transportation access across communities. Completed feasibility studies for improving public transit access across multiple municipalities.

Real Estate Economics

Constructed a scenario-based development feasibility model for the City of Somerville to test the impact of increasing their inclusionary housing percentage. The model helps city staff and policy makers understand the impact municipal regulations can have on residential development in Somerville.

Zoning

Constraints and Opportunities

Developed a parcel-by-parcel build out analysis for several downtown locations in the Greater Boston region to better understand the implications of current zoning regulations on the built environment. Recommended zoning changes based on the outcome of the build out analysis that would help make new projects financially feasible and improve overall site and building design.

Design Guidelines

Created a supplemental design guideline booklet for communities to help integrate new development into the historical framework of their downtown.

Public Engagement

Developed and implemented public engagement processes for groups as small as 10 and as large as 300. Engagement efforts included focus groups, site walks and tours, interactive open houses, small group exercises, and large town hall meetings. Engagement sessions have been held in multiple languages with interpretation and translation of written materials. Mr. Halvorsen has been trained as a facilitator by the Interactive Institute for Social Change (IISC).

PATRICK M. MCCAFFERTY, MARKET ANALYST/ URBAN PLANNER

PROFESSIONAL PROFILE

Patrick is a strong proponent of the important role geography can play in untangling complex issues. His professional background is rooted in implementing geographic analysis to demystify the real estate market and tackle targeted socio-economic issues. He provides technical assistance, statistical analysis, and customized reports for clients across the country. His interests and expertise includes; transit oriented development, fiscal impact, spatial statistics, GIS, and trend analysis.

EDUCATION

- BA in Urban/ Regional Planning; Miami University, Oxford, Ohio
- Master of Arts (MA) in Community Development and Planning; Clark University; Worcester, Massachusetts

PROFESSIONAL AFFILIATIONS

- Environmental Design Research Organization
- International Association of Assessing Officers
- Cartography and Geographic Information Society

PROJECT EXPERIENCE

Geostatistical Modeling

Land Value Response Surface

As a Senior Research Analyst with the City of Boston, pioneered the city's new land valuation technique from a linear approach to a geographically-based, fitted, three-dimensional response surface. This new advancement dramatically increased the model's efficacy resulting in equitable property taxes.

Urban Revitalization

Worked with Clark University and the City of Worcester to create an evaluative criteria for mapping and diagnosing urban blight for a targeted, more manageable, abatement strategy. Research goals were achieved via a phenomenological approach toward social and infrastructural characteristics

Economic & Fiscal Analysis

Transportation Oriented Development

Formulated the model using geographically weighed regression in combination with detailed mapping techniques in order to forecast the effect of proximity to proposed train stops on property values in Somerville, MA.

Gentrification Study

Conducted a real estate market analysis aimed at dissecting the temporal phases of gentrification in Boston. Study employed a number of economic, social, and infrastructural indicators with the goal of pinpointing real and potential micro-variations in the real estate market.

Redevelopment Potential Analysis

Assisted in a reuse project for the town of Easton. Contributed maps and market analytics for the purpose of achieving a practical redevelopment strategy.

Mapping

Environmental Justice

Developed a series of maps based on environmental justice criteria for the City of Worcester. Maps also examined the intersection between TAI sites and elementary school service areas.

Market History

Provided a holistic geo-based review of real estate in Boston for the Mayor's office. Time frame encompasses 1980-2020

Mental Health

Submitted a GIS-based report on the effect of the built environment on mental health hospitalization for Cincinnati's (OH) Mental Health Department. Project aim was to devise a more sustainable rehabilitation outcome.

DODSON & FLINKER

Landscape Architecture and Planning

PETER FLINKER

Principal, Landscape Architect & Planner

ASLA, AICP CEP

PROFESSIONAL EXPERIENCE

Dodson & Flinker (formerly Dodson Associates)

Landscape Architects & Planners, Ashfield, Massachusetts

Principal: 1998 - Present

Project Manager and Landscape Architect: 1987-Present

Landscape Architect and Certified Planner on projects ranging in scale from residential and commercial site design to regional planning. Active in exploration of the use of creative design and alternative technologies to accommodate growth in changing urban, suburban and rural landscapes. As an author and illustrator, has prepared numerous publications designed to help both professionals and laypeople understand complex planning and design concepts, including the award-winning South County Design Manual, the Urban Environmental Design Manual and the Rhode Island Conservation Development Manual. A frequent presenter to conservation groups, town boards and professional organizations on the topics of Smart Growth and Sustainable Development, has facilitated dozens of charrettes for Main Streets, village centers and highway corridors, and prepared numerous master plans and construction documents for schools, parks and other public facilities.

SELECTED CURRENT AND RECENT PROJECTS

A leader in planning and design for schools, parks, streetscapes and other public facilities that balance creative site planning with efficient and cost-effective design strategies. Active in helping communities create master plans for historic districts, main streets and sensitive environmental areas.

RhodeMap RI Growth Centers Plan | State of Rhode Island, 2014

Village Development Guidance Manual | State of Rhode Island, 2014

Turner's Falls Downtown Livability Plan | Montague, Massachusetts, 2013

Whitman Hanson Elementary School Landscape Planning | Hanson, MA, 2013

Merrick Neighborhood Plan and Form-Based Code | West Springfield, Massachusetts, 2012

Norfolk County Agricultural High School Master Plan and Landscape Construction Documents | Walpole, MA, 2006-2012

Groton Town Center Design Guidelines | Groton, Massachusetts, 2012

Exeter Vision and Village Implementation | Exeter, Rhode Island, 2011

Station Avenue Masterplan | Groton, Massachusetts, 2008

Urban River Visions | Six Massachusetts Towns, 2006

Oxford Downtown Preservation Project | Town of Oxford, Massachusetts, 2006

Urban Environmental Design Manual | State of Rhode Island, 2002

AWARDS

American Planning Association - Massachusetts Chapter:

2013 Planning Project Award for the Turners Falls Downtown Livability Plan

Boston Society of Landscape Architects:

2012 Merit Award in Analysis & Planning for the Exeter Visions Project

2007 Merit Award for the Urban Environmental Design Manual.

2006 Honor Award for The Rhode Island Greenspace Program.

2006 Honor Award for The Blackstone River Visioning Project.

1992 Merit Award for Mansfield Training School Masterplan.

American Society of Landscape Architects:

2003 Merit Award in Analysis & Planning for the Buffalo Bayou Masterplan, Houston, TX.

2002 Honor Award for The South County Design Manual.

Rhode Island Historical Preservation and Heritage Commission:

2002 State Historic Preservation Planning Award, for South County Watersheds Technical Planning Assistance Project.

PROFESSIONAL REGISTRATION & MEMBERSHIPS

Massachusetts Registered Landscape Architect #976

Member, American Society of Landscape Architects

Member, American Institute of Certified Planners, 2000.

AICP Certified Environmental Planner, 2011

ASLA Centennial Community Assistance Team: New England Greenway Project

Founding Member, Mill River Greenway Initiative

EDUCATION

University of Massachusetts at Amherst - Masters in Landscape Architecture, 1987

Hope College, Holland, Michigan - Bachelor of Science in Biology, 1982

NATHAN ALAN BURGESS

Associate

PROFESSIONAL EXPERIENCE

Dodson & Flinker

Landscape Architects & Planners, Ashfield, Massachusetts

Associate: 2013- Present

Associate landscape designer and planner, assisting with a wide range of projects, from GIS mapping and analysis for statewide planning to construction documentation for schools, parks and other facilities. In addition to receiving fellowships, scholarships and awards as a Masters Candidate at the University of Virginia, he has published multiple articles on the subject of adapting to climate change in coastal regions, building on an undergraduate degree in geology from the College of William and Mary. Nate's previous professional and academic work have also provided him with a broad understanding of the issues surrounding, and approaches to managing, historic buildings and landscapes. Nate brings to the firm exceptional technical skill in Geographic Information Systems, CAD and three-dimensional visualization, and is currently playing an active role in many projects at D&F, including a visual assessment of the Thousand Islands region of upstate New York and a beach masterplan in Swansea, Massachusetts.

PREVIOUS EXPERIENCE

Trainee, National Park Service Historic American Landscape Survey -Washington, DC, - Summer 2013

UVA Externships: Landworks-Studio (2013); Michael Vergason Landscape Architecture(2012);
Lee & Associates (2011)

Cultural Landscape Report Fellow, UVA Office of the Architect - Charlottesville, VA Summer 2012

Copy Editor and Editor, Lunch Vol. 6, 7 - Charlottesville, VA, Fall 2011-Spring 2012

Landscape Architecture Internship: Anchor QEA - Seattle, WA, Summer 2011

Landscape Design Consultant, Residence at 316 Hendren Ave - Staunton, VA, Summer 2011

American Geological Institute Comm. Specialist & Assistant Designer of Earth Magazine - Alexandria, VA, Spring 2009 (internship), Spring 2009-Summer 2010,

Architecture Internship: Hopke and Associates - Williamsburg, VA, Fall 2008

AWARDS

James Rose Center Suburbia Transformed Award, 2014
Kenan Teaching Fellowship, Fall 2012-Spring 2013
Landscape Architecture Departmental Fellowship, Fall 2011
Anchor QEA Scholarship, Spring 2011
Phi Beta Kappa Ludwell H. Johnson Scholarship, 2008
Charles Center Summer Research Scholarship, 2008
J.Binford Walford Scholarship in Architecture, 2005-2006
Monroe Scholarship, 2004-2008

SELECTED PRESENTATIONS AND PUBLICATIONS

Burgess, Nate, "Mobilizing Community, A Residential Model for Rising Seas," Winner - Professional Visionary Category, 2014 Suburbia Transformed 3.0 Competition, James Rose Center.

Stevens, Rachel, Kristina Hill, Nate Burgess, Amy Grady, "New Beach Designs as an Urban Adaptation to Sea Level Rise," Research presented at 2013 Annual Conference of the Council of Educators in Landscape Architecture, Spring 2013. Paper distinguished as the "Outstanding Paper" in the first issue of CELA's peer-reviewed Landscape Research Record.

Burgess, Nate, "Geotextiles: From Sludge to Shoreline Protection to Surfing - What's Next?" Earth magazine, November 2011, vol. 56, no. 11 <http://www.earthmagazine.org/article/geotextiles-sludge-shoreline-protection-surfing-whats-next>

Burgess, Nate, "Researching Future Flood Risks In California's Sacramento-San Joaquin River Delta," Earth magazine, September 2010, vol. 55, no. 9 <http://www.earthmagazine.org/sites/earthmagazine.org/files/toc092010.pdf>

Burgess, Nate, "Lewis Reeve Sams House," Vernacular Architecture Forum 2007 Guidebook

EDUCATION

University of Virginia: School of Architecture

Master of Landscape Architecture; Graduated May 2013

European Masters In Landscape Architecture (EMiLA) Intensive Program Workshop

Barcelona, Spain, October 2012 (one week)

The College of William & Mary

B.S. Geology (Concentration: Environmental Geology), English

Summa Cum Laude, Phi Beta Kappa, High Honors in Geology; Graduated December 2008

Colonial Williamsburg Architectural History Field School

Williamsburg, VA, Summer 2006 (one month)

JENNIFER M. GOLDSON, AICP, FOUNDER AND PRINCIPAL PLANNER

PROFESSIONAL PROFILE

Jennifer M. Goldson, a certified professional planner, formed JM Goldson community preservation + planning in 2006 to help communities create successful community visions and master plans, community preservation programs, and address affordable housing needs. Her 20+ year professional background blends affordable housing, comprehensive planning, historic preservation, open space conservation, community engagement, and implementation of the Massachusetts Community Preservation Act. Jennifer is certified by the American Institute of Certified Planners and is a member of the International Association of Facilitators.

JM Goldson provides client communities with a holistic and thoughtful approach to planning. JM Goldson's approach focuses on protecting community assets and enhancing housing choice in ways that are compatible with other community and regional goals. JM Goldson is known for facilitating highly-interactive public engagement and customizing services to best meet client communities' needs.

JM Goldson has a strong track record assisting communities with community visioning and master planning, community preservation, and affordable housing planning and implementation, including Community Vision Plans, Housing Production Plans, Housing Needs Assessments, Community Preservation Plans, and Affordable Housing Trust Action Plans. Jennifer is the primary author of Massachusetts Housing Partnership's (MHP) *Municipal Affordable Housing Trust Guidebook*, which received the 2010 Outstanding Planning Award from the Massachusetts Chapter of the American Planning Association. Jennifer is also the primary author of MHP's *Municipal Affordable Housing Trust Implementation Manual*, released in November 2015, and the updated MHP and CHAPA Community Preservation and Affordable Housing Guidebook *Create, preserve, support*, released in early 2016.

Among JM Goldson's municipal clients are Agawam, Amherst, Arlington, Barnstable, Brewster, Bridgewater, Brookline, Concord, Eastham, Easton, Hopkinton, Grafton, Manchester-by-the-Sea, Medway, Middleborough, Norwood, Pelham, Stockbridge, Stoughton, Somerville, Southborough, Sudbury, West Bridgewater, Westford, Westport, and Williamstown. In 2008, Jennifer was the primary author of the Community Preservation Coalition's *CPA Update*, a monthly email-newsletter subscribed to by Community Preservation Committees across the state.

Prior to forming JM Goldson, Jennifer managed the City of Newton's Community Preservation program, one of the first and largest CPA programs in Massachusetts. Under her management, Newton's CPA program funded over \$12 million in community housing, open space, recreation, and historic preservation projects, including the city's purchase of Angino Farm, the last farm in Newton, and Kessler Woods. Working with the city from inception of the CPA program, she established and administered a clear and effective evaluation and review process that the Community Preservation Committee relied on to select projects in highly competitive funding rounds.

As project manager for the Town of Brookline's comprehensive planning initiative, Jennifer worked closely with the Comprehensive Plan Committee, town officials, and neighborhood groups to identify issues and opportunities in the areas of affordable housing, parks and open space, historic

preservation, transportation, economic development, and community facilities. Jennifer was primary author of *The Brookline Plan: Program & Progress*, a document culminating the first phase of the comprehensive planning process.

In addition to her experience in local government, Jennifer has extensive experience in the private sector. She was a preservation planner for the Newport Collaborative Architects, a full-service architecture and planning firm in Newport, Rhode Island, where she prepared community visioning and master plans. She also developed town-wide historic resource surveys for the Connecticut Historical Commission and prepared historic tax credit applications for rehabilitation projects in Rhode Island. Prior to that, Jennifer was a preservation research associate for the Conservation Technology Group in Newport, a firm specializing in the conservation of historic sites, architecture, and monuments.

Jennifer earned a Master's degree in Community Planning from the University of Rhode Island and a BS in Historic Preservation with a minor in Architecture from Roger Williams University. She was editor of the New England Planning Newsletter and served on the Board of the Massachusetts chapter of the American Planning Association.

In her hometown, Jennifer served as vice president of the Roslindale Village Main Street (RVMS) Board of Directors, co-chair of the RVMS Design Committee, and was appointed by Mayor Menino as a member of the Roslindale Advisory Group for Strategic Planning & Rezoning. She was recognized by Mayor Menino for her contributions to the RVMS Design Committee as volunteer of the year.

AMANDA BERMAN, SR. COMMUNITY PRESERVATION PLANNER

PROFESSIONAL PROFILE

Amanda Berman joined JM Goldson community preservation + planning in June 2016 as a Senior Community Preservation Planner. Amanda's 13+ years of professional experience includes community and economic development, cultural planning, public space planning and programming, program and event development, community outreach and engagement, and marketing.

Amanda is a recent transplant to the Boston area from Los Angeles, where she served as the Director of Community Development and Planning for Community Arts Resources (CARS) for eight years. In this role, Amanda had the unique opportunity to work with Southern California municipalities and other government agencies on visioning plans that pushed forward strategic civic initiatives, such as new complete street corridors and public spaces.

Amanda has a strong track record of incubating and managing innovative and interactive public programs that help to shift perceptions of a particular place or neighborhood, and has created numerous community outreach and engagement campaigns that correspond to these efforts. One such program is CicLAvia, the series of car-free, open-street events that has drawn hundreds of thousands of Angelenos to celebrate their city by bicycle and foot in ways they'd never imagined. Amanda is proud to have been one of the driving forces behind this beloved and impactful urban initiative.

Amanda is extremely passionate about developing inventive solutions to a community's most pressing challenges. Her most successful and rewarding projects have been those that involve multiple strategic partners coming together to problem-solve around a particular urban issue or opportunity.

In addition to her experience in urban and cultural planning, Amanda has worked in the entertainment industry, helping to create an important connection between film and social impact. As a Director with Prosocial, a social impact consulting firm, Amanda developed and managed online the offline social action campaigns for the documentary "Bully." The campaign helped to cultivate a national grassroots awareness of the film through targeted organization outreach and strategic partnership development with notable partners, including Facebook and the Ad Council.

As the Assistant to the Executive Vice President of Corporate and Community Affairs of Participant Media, Amanda supported in the creation and oversight of innovative social action campaigns for such films as Al Gore's "An Inconvenient Truth" and George Clooney's "Good Night and Good Luck."

Amanda holds a dual-master's degree in urban planning and public art studies from the University of Southern California, and a bachelor's degree in communications and business from The Pennsylvania State University.

Anne S. Galbraith, AICP
Principal



Professional Summary

Anne S. Galbraith has been involved in urban planning, strategic planning, public policy and economic development projects at the state and municipal level for 30 years. Primary expertise is focused on the development and management of urban transportation systems. Additional capabilities include project management, comprehensive planning, conceptual project development, cost/benefit analyses, project finance, economic development, zoning, and federal compliance.

Certifications/Memberships

American Institute of Certified Planners (AICP),
Barrington Planning Board, Town of Barrington, RI.
Chair of 3 Subcommittees: Zoning, Transportation, and Capital Improvement Plan
Member, American Planning Association (APA).
Member, Women's Transportation Seminar (WTS).

Education

Bachelor of Arts in Mathematics and Urban Studies, Washington University, St. Louis, MO. 1984

Relevant Project Experience

- **Providence Redevelopment Authority On Call Planning Services.** *Provides ongoing operational support for municipal redevelopment agency including housing loan programs, TIF district planning and creation of project pro-formas.*
- **City Centre Warwick Design Guidelines (Warwick RI).** *Working to draft Design Guidelines in a Transit Oriented Development District adjacent to TF Green Airport and a new commuter rail station. Guidelines will build upon past master planning efforts and market studies to articulate desired design standards and establish procedures to speed the design review process and create a strong pedestrian environment.*
- **RI Public Transit Authority Five Year Strategic Plan.** *Served as Project Manager working with RIPTA's Board of Director's to articulate and present a practical and implementable near-term plan for system preservation, enhancement and expansion, as well as internal management and budgetary policies.*
- **MassDOT Beyond Boston Study (statewide).** *Supported MassDOT in facilitating the development of common standards and visionary goals among the 15 regional transit authorities in MA, as well as conducting a national peer analysis to identify areas where new efficiencies or improved management practices could be introduced.*
- **RI Land Use Collaborative Strategic Plan (Grow Smart RI).** *Helped conduct group facilitation, set priorities and establish performance measures for a non-profit consortium of organizations interested in advancing critical land use initiatives in Rhode Island.*