

Response to the RFP

Unified Plan

Town of Wellesley

July 22, 2016





Stantec Planning and Landscape Architecture P.C.
226 Causeway Street, Boston, MA 02114

July 22, 2016

Wellesley Board of Selectmen
525 Washington Street
Wellesley, MA 02482

RE: Town of Wellesley, Unified Plan Proposal- Technical Proposal

Dear Board of Selectmen,

Stantec's Urban Places Group is excited to submit our proposal to the Town of Wellesley to create the Wellesley Unified Plan, an innovative, combined comprehensive plan update and community strategic plan to guide decision making over the next ten years. I have had the pleasure of leading two Wellesley planning projects, the Wellesley Hills Square plan and Wellesley's award-winning 2007-2017 Comprehensive Plan, which the Town has been implementing over the last ten years. Consistent with Wellesley's heritage of commitment to planning, the Town's desire to integrate a strategic plan for municipal government with a vision-based comprehensive plan is an innovative approach for a community that is also committed to a tradition of citizen-led government.

A mature suburban community, Wellesley is a success story with an excellent school system, three commuter rail stations, three neighborhood-serving village commercial areas, a trail system that reaches throughout the town, colleges and private schools, a substantial nonresidential tax base, and an increasing commitment to sustainability. At the same time, the town faces challenges in balancing the type and amount of housing development, providing open space networks and recreation opportunities, efficiently maintaining high levels of public services, and improving mobility networks. The Town's recent purchase of the North 40 parcel and study of how to best use the parcel to meet town goals provides the most recent example of the balancing act facing the community. While the community faces complex challenges, Wellesley's town government organization of multiple boards and commissions could provide for a more efficient system of town-wide priority setting, alignment of resources, transparency, and accountability. Through the Unified Plan, the Town will update the comprehensive plan while integrating a town government strategy to ensure effective implementation and monitoring of the plan.

Stantec is a multidisciplinary consulting firm with more than 22,000 employees in 400 locations. The Urban Places Group (UPG), which is based in Boston, was created in 2014, when David Dixon, FAIA, and Larissa Brown, PhD, AICP, along with four colleagues, moved from Goody Clancy to Stantec to create a specialty practice within Stantec. UPG members facilitate smarter growth, revitalization, sustainability and resilience through integrated planning for land use, urban design, transportation, economic development, housing, open space, and equitable community development. We have experience building consensus in complex planning environments and with diverse communities. As a boutique practice within a larger firm, UPG can draw on Stantec's technical specialists in a multitude of design, engineering, real estate, and environmental science fields.

Our work has been recognized by multiple national, regional, and state awards from organizations such as the American Planning Association (APA), Congress for the New Urbanism (CNU), and the American Institute of Architects (AIA), including a 2007 award for the Wellesley 2007-2017 Comprehensive Plan from the Massachusetts Chapter of the APA. And, perhaps most importantly—our plans get implemented.

As the leader of the UPG comprehensive planning practice, having prepared over twenty plans, I will be principal-in-charge and project manager for the Wellesley Unified Plan project. Over the course of my career, I have prepared plans for nine Massachusetts communities (urban, suburban, and semi-rural), I was a co-founder of the Massachusetts Smart Growth Alliance, and served as a member and chair of the Cambridge Planning Board. My work also includes

comprehensive plans for a wide range of communities all over the country, such as Warwick (RI), Fontana (CA), New Orleans (LA), Tyler (TX), and Birmingham (AL). I am also part of Stantec's resilience group, focusing on holistic planning for climate change adaptation, and I participated as a subject matter expert last year in regional resilience training meetings sponsored by the Rockefeller Foundation and the U.S. Department of Housing and Urban Development.

UPG's staff of planners, urban designers, architects, GIS specialists, and landscape architects will support our planning work for Wellesley. Stantec specialists in transportation and infrastructure, led by Alan Cloutier and Frank Holmes, and real estate and development economics analysts, led by Drew Leff, will serve as advisors.

Joining us for the Wellesley project are four specialists who will add their expertise to our team:

- » **Jane Wiseman, Institute for Excellence in Government.** Jane specializes in helping governments become more effective, transparent, and efficient. She has worked as a financial advisor and management consultant to government and has served in federal and state government. Her work addresses customer-driven government, civic engagement, and data-driven decision-making in government. She provides technical assistance to cities implementing innovation projects funded by Bloomberg Philanthropies Mayors Challenge and is creating a national network of chief data officers in cities. She has developed tools and templates for community-based strategic planning and has taught strategic planning. She will lead the town government strategy aspect of the Unified Plan process.
- » **Daphne Politis, Community Circle.** Daphne is a planner with extensive experience working with Massachusetts communities. She has special expertise in community process, which will be her focus for the Unified Plan. Her comprehensive plan and community engagement work in the last five years includes master plans for seven Massachusetts communities, such as Acton and Milton, as well as municipalities in Maine and New Hampshire. In addition, Daphne has experience in health and wellness planning and will contribute to a health element, should funding become available.
- » **Peter Kwass, Peter Kwass Consulting.** Peter is an economic development specialist who has worked with Larissa on many economic development elements for comprehensive plans and plans for New Orleans, Birmingham (AL), Mansfield (CT), and Corpus Christi (TX). He will serve as an advisor on economic development.
- » **Bonnie Heudorfer, Housing Consultant.** Bonnie prepared a detailed housing analysis and plan for affordable housing for the 2007-2017 Comprehensive Plan and is the author of numerous state, regional, and local housing analyses and plans. In addition to the Wellesley plan, Bonnie has worked with Larissa on a state of Rhode Island sustainability plan. She will serve as an advisor on housing issues.

I am excited about the possibility of working with Wellesley again to create this innovative Unified Plan. Our entire team is ready to build on Wellesley's successes and help the Town create an achievable vision for the future with the strategies and actions to make the vision a reality. We would be happy to present our qualifications and approach to you in person. If you have any questions or require additional information, please do not hesitate to call me for more details.

Sincerely yours,

Stantec Planning and Landscape Architecture P.C. | Stantec Urban Places Group



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Holly Cleaners

Your furs are an investment
Keep them safe!
Fur Storage at Holly Cleaners
Free box storage available*
www.hollycleaners.com

Shoe Repair

Handwritten sign on sidewalk

iPhone
iPad
XBox
SAME DAY
REPAIR



Team Qualifications

OUR TEAM FOR THE WELLESLEY UNIFIED PLAN

Stantec's team for the Wellesley Unified Plan is composed of a core leadership team of Stantec, the Institute for Excellence in Government, and Community Circle. Supporting the core leadership team will be a technical team from Stantec and a group of advisors for specific issues. The advisors include Stantec experts as well as Peter Kwass Consulting and Bonnie Heudorfer, who was a member of the 2007-2017 Comprehensive Plan team.

Stantec

Our team will be led by Stantec's Urban Places Group (UPG), a specialized practice within Stantec's interdisciplinary consultant firm of 22,000 employees. UPG was created in 2014 and is led by David Dixon, FAIA and Larissa Brown, PhD, AICP, who joined Stantec with four other colleagues from Goody Clancy. They have a long track record of national, state, and regional award-winning plans and recognition for excellence by the American Planning Association, the American Institute of Architects, the Congress for the New Urbanism, and other professional associations, as well as numerous plans that have been successfully implemented.

UPG maintains the focus and responsiveness of a boutique firm, but because it is part of one of the world's largest design firms, we can also call on field-leading experts in a broad array of disciplines. With this clear focus and a unified interdisciplinary approach, the planners, urban designers, landscape architects, architects, graphic designers, and GIS specialists of the Urban Places Group help communities across North America develop visions and plans to chart a path to greater livability, opportunity, equity, sustainability, and resilience.

We are experienced across scales, from multi-county regions to cities and towns, neighborhoods, and specific sites. We are committed to collaborative planning based on an interactive dialogue with community members and known for achieving successful outcomes in complex planning environments with multiple, diverse stakeholders.

Multidisciplinary expertise is a Stantec strength. In addition to Stantec's UPG group, our team for Wellesley includes Stantec experts in form-based zoning, transportation, infrastructure, real estate analysis, and development economics. Should additional specific technical issues emerge during the planning process for Wellesley, our team will have access to Stantec's deep bench of technical expertise, with national leaders in architecture, civil engineering, environmental science and management, infrastructure, landscape architecture, transportation planning, power, and real estate and project delivery.

Stantec Project Leadership

The entire Unified Plan project team will be led by project director and manager **Larissa Brown PhD, AICP**. Larissa will be the primary client contact and responsible for the entire process and delivery of interim and final documents.

Larissa has prepared twenty community-wide plans, six of which have won state APA or AIA awards in the last ten years, as well as a national APA award. Recent community-wide plans include Warwick (RI); Mansfield (CT), the home of the University of Connecticut's flagship campus in Storrs; Birmingham (AL); Shreveport (LA); and a general plan update in process for Fontana, (CA). She was project director for the New Orleans Master Plan, which won a national APA award, and is now in the five-year update process. Larissa's award-winning City of Tyler (TX) comprehensive plan led to implementation of over two-thirds of the recommendations and an update in five years. She also led preparation of an award-winning citywide parks and public spaces plan for the City of Miami (FL). In addition, Larissa is part of Stantec's resilience group, focusing on holistic planning for climate change adaptation. In 2015 she served as a subject matter expert and facilitator for three regional Resilience Academies organized by the Rockefeller Foundation to assist jurisdictions eligible to apply for the HUD National Disaster Resilience Competition.

Larissa has extensive experience in Massachusetts. She has prepared master plans for nine Massachusetts communities (urban, suburban, and semi-rural), five state-approved open space and recreation plans, and served as Chief Planner for the Northern Middlesex Council of Governments. She was a founder and board member for the Massachusetts Smart Growth Alliance. Larissa also served as a member and chair of the Cambridge Planning Board during a period of intense development activity and rezoning of all nonresidential areas. Larissa led and prepared Wellesley's award-winning 2007-2017 comprehensive plan. Among the implementation actions derived from the plan are the Natural Resources Protection Overlay district to require open space residential design for larger parcels;

Large House Review; a study of in-town public transportation and membership in the regional transportation system; and the Wellesley West Gateway Study.

Stantec Technical Team

The Stantec technical team includes staff with expertise in planning, urban design, landscape architecture, GIS, and real estate analysis.

Erin Garnaas-Holmes, ASLA, a landscape architect and planner, will serve as the deputy project manager and technical planner. Erin has experience in public realm urban design for transportation, redevelopment, and open space planning. His work for Wellesley will include a focus on the conservation, open space and recreation issues in the plan. Erin is also skilled in GIS and has produced the full range of GIS maps for two comprehensive plans.

Nels Nelson is a planner and urban designer with experience across scales, working on comprehensive plans, including GIS, and developing detailed district plans for walkability. Nels also has unique experience with smart urban systems, closing energy and material cycles. He has provided analysis and mapping for several comprehensive plan projects.

Wei Jin, LEED AP, an urban designer and architect, has experience on a wide range of architectural and urban design projects, ranging from mixed-use and residential planning and design, to campus planning. Her strong design skills and environmental sensitivities integrate physical design solutions with social aspects and natural systems. She has produced concept plans and renderings for comprehensive plans as well as for many other planning and urban design projects

Alexandra Phillips is an experienced real estate analyst who also has a master's degree in urban planning, giving her a broad perspective on real estate development. For the Wellesley plan, she will provide market-based analysis as needed.

Stantec Advisors

A group of Stantec advisors with specific expertise will be available to support the Unified Plan Team for form-based zoning, transportation, stormwater management, and other infrastructure.

Craig Lewis, FAICP, LEED AP, CNU-A will advise on form-based zoning. He has prepared form-based codes for several communities, including the Davidson (NC) code, which won an EPA Smart Growth Award in 2006 for balancing open space protection with walkable neighborhoods and vibrant village centers. Craig has over twenty years of experience implementing the principles of smart growth, new urbanism, and sustainability through comprehensive community planning, form-based codes, urban design, downtown redevelopment, public/private partnerships, mixed-use infill and neighborhood design.

Alan Cloutier, PE, PTOE, will advise on transportation and mobility. As needed, he will participate in meetings on transportation issues and provide guidance on plan content. He has diverse experience in multimodal analysis, corridor improvements, parking studies, and other transportation issues. Projects include corridor master plans for Dennis (MA), a downtown parking study for Southbridge (MA), and numerous pedestrian and bike trail studies.

Frank Holmes, PE, LEED AP, is a civil engineer who will be the team's advisor on infrastructure. As needed, he will participate in meetings and provide guidance on plan content related to water, sewer, and stormwater management including green infrastructure. Frank has more than twenty years of experience in planning and design for municipal infrastructure needs. His recent work includes several Wellesley projects: design of major gravity and sewer force mains for Waterstone at Wellesley serving approximately one-third of the Town of Wellesley; stormwater design and permits for Temple Beth Elohim; and roadway reconstruction on Washington Street. His familiarity with Wellesley's infrastructure

systems will help the team assess and prioritize infrastructure issues for the Unified Plan.

Drew Leff will advise on real estate and development issues. Drew will bring his more than forty years of real estate and economic development experience spanning private, institutional and government sectors to the Wellesley Unified Plan.

Community Circle

Core Team–Public Engagement

Daphne Politis, AICP of Community Circle, has more than 22 years of experience in planning, programming, and public participation. She will organize and implement the public engagement process for the Unified Plan, working with and supported by the other members of the team. As a planner, trained facilitator and certified mediator, she has designed and led community awareness and engagement programs in over two dozen municipalities and conducted user needs evaluations in a variety of other settings. Her Massachusetts municipal work includes public engagement for a number of towns including Milton, Acton, Southbridge, Belmont, Medfield, and Westford.

Institute for Excellence in Government (IEG)

Core Team–Town government Strategy

Jane Wiseman of the Institute for Excellence in Government will have primary responsibility for the Unified Plan elements focused on a strategy for town government to effectively implement comprehensive plan priorities to achieve the overall vision. Jane has provided management, organizational, and strategic advice to local, state, federal, institutional, and private sector organizations, including technology, financial and budget advice. In addition to creating strategic plans, she has trained managers on strategic

planning, setting priorities, and measuring outcomes. A former Assistant Secretary of the Massachusetts Executive Office of Public Safety, Jane has also worked as a consultant for Oracle Consulting, Accenture, Pricewaterhouse. Recent publications include “Customer-Driven Government: How to Listen, Learn, and Leverage Data for Service Delivery Improvement” and “Analytics Excellence Roadmap: A Four-Stage Maturity Model for Data-Driven Government,” both published by the Harvard Kennedy School’s Ash Center for Democratic Governance and Innovation.

Peter Kwass Consulting

Economic Development Advisor

Peter Kwass has thirty years’ experience in economic development—comprehensive, entrepreneurship and small business, workforce, and community-based development. He prepared the economic development element of Wellesley’s 2007-2017 Comprehensive Plan and his role on the Unified Plan team is to advise the team on updating that element and to participate in outreach to the business community in Wellesley. Working with Larissa, he has prepared economic development elements for the comprehensive plans for many other diverse communities, ranging from Mansfield (CT) and Warwick (RI) to New Orleans and Birmingham (AL).

Bonnie Heudorfer Consultant

Housing Advisor

Bonnie Heudorfer specializes in housing and community development analysis, strategies and programs. She was a member of the team for Wellesley’s 2007-2017 Comprehensive Plan, advised on the housing element, and prepared the framework for affordable housing planned production. For the Unified Plan, she will advise on updating the housing element and participate in meetings related to affordable housing issues. Bonnie has prepared housing and community development plans for municipalities, public and quasi-public agencies, nonprofits, and academic and financial institutions. Recent work includes housing plans for the states of Massachusetts and Rhode Island and the annual Greater Boston Housing Report Card for six years. She is a former senior research associate at the Northeastern University Dukakis Center for Urban and Regional Policy, as well as former chair of the Town of Harvard’s Housing Partnership.

AVAILABILITY

All of our team members, including subconsultant partners, are ready and available to begin working with Wellesley on this plan. With respect to current and projected workloads across all disciplines, we are confident that we will be fully available to complete work on the Unified Plan over the course of the expected 2016-2018 duration of the project.

HOW WE MEASURE UP

RFP Section 9: Consultant Qualifications

| | Stantec | Community Circle (WBE) | Institute for Excellence in Government |
|--|---|---|---|
| Five (5)+ years' experience in strategic planning, comprehensive plan development, public policy, or management consulting. | Yes | Yes | Yes |
| Principal and project manager are available for meetings with the Town on days or evenings. |  |  |  |
| Previous experience in the management of public information processes and developing municipal strategic plans and comprehensive/master plans; | Yes | Yes | Yes |
| » Completion of five (5) similar plans | Yes* | Yes | Yes |
| Available to immediately initiate work and maintain significant availability through the duration of the project without impact from current and projected workload. |  |  |  |

*Representative of projects and experience under our Project Manager, Larissa Brown's, direct leadership.



WELLESLEY TOWN HALL

NO MOTOR VEHICLES ENTER

Project Understanding, Approach, & Work Plan

PROJECT UNDERSTANDING

The Town of Wellesley is seeking a visionary and innovative plan that unites the benefits of an integrated comprehensive plan for physical development with a strategic plan to achieve the vision through effective town government—a Unified Plan to create a “livable, innovative, fiscally-sound tomorrow,” as articulated in the LIFT Wellesley UP prospectus.

Wellesley’s success as a community is partially due to its commitment to implementing regular updates of its comprehensive plan for physical development of the town. At the same time, the Town has also depended on a highly democratic, citizen-led municipal government. Organized in boards and commissions (10 elected and 23 appointed), representative Town Meeting with 240 members and a Moderator, and an elected Town Clerk, town government is assisted by an Executive Director and two deputies. In this system, elected boards are responsible for budgets, staff, and overseeing work in their respective areas but there is no one office or individual ultimately responsible for overall town priorities and aligning the town budget and work to achieve a town-wide vision.

Starting in the spring of 2015, the Unified Plan Working Group collaborated with the town’s boards, commissions and departments to develop the framework for the Unified Plan. The planning process will include an effective public engagement program to build consensus and guidance from a highly representative steering committee. Clear understanding and analysis of current conditions

and trends, including service delivery, capital investments, and decision-making processes will provide the foundation for development of a town-wide vision based on community values and principles. The vision and principles will then guide a process to set priorities among the goals, strategies, and implementation actions developed to achieve the vision, along with metrics to evaluate progress. The Town government strategy to be created as part of the planning process will be integrated into the implementation program, and include a detailed framework, strategy, and program to align financial decisions, investments, and accountability with achievement of the vision and goals.

Wellesley’s nearly built-out condition ensures that certain long-standing issues are likely to continue to be a focus of discussion during the planning process: open space and recreation options; affordable housing; preservation of town and neighborhood character; mobility; and meeting infrastructure and service delivery needs. How best to balance development or redevelopment with preservation and continuity will likely be a repeating theme during the planning process, with the future of the North 40 a special example. While the Town established a Large House Review bylaw, as recommended in the 2007 Comprehensive Plan, teardowns are still a concern, with 95 teardown permits issued in 2015 (according to the Wellesley Townsman). The Historical Commission has recently taken up another recommendation from the 2007 Comprehensive Plan—a demolition delay bylaw for historic properties. Wellesley has also become increasingly committed to sustainability. It is a leader in the percentage of households purchasing renewable energy, as well as other

green practices. The Unified Plan is an opportunity to continue to lead by example with sustainability informing the community's vision, goals, priorities, and implementation plan.

APPROACH

Stantec brings to the Wellesley Unified Plan an approach that is community-based, strategic, integrative, user-friendly, and implementation-focused.

- » **Community-based.** Wellesley stakeholders' vision, values, principles, and goals for the future will guide the plan. A robust public participation and consensus-building process will build public awareness about the opportunities and constraints facing the town as well as about policy choices and their implications. There will be multiple opportunities for face-to-face and digital participation. At the same time, our team will work very closely with the Steering Committee, which will be highly representative of town government and residential, commercial, institutional, and educational stakeholders.
- » **Integrative and interdisciplinary.** The Wellesley UP will provide a holistic policy framework that effectively integrates the plan's elements, builds on existing planning, and inserts the plan into a town government strategic framework. The implications of policy choices in specific elements will be evaluated for their critical mass and combined strategic impact on achieving the vision and goals.
- » **User-friendly and visually rich.** We will illustrate selected concepts so the public and Town staff can envision the results of achieving the plan's visions and goals. The planning process and products will include maps, diagrams, photos/photo-montages, drawings, charts, graphs, tables, and text.
- » **Implementation-focused.** We think about implementation from the beginning. Working closely with the Steering Committee, Boards and Commissions, Town staff, and other stakeholders, we will develop an

implementation and action plan that clearly relates the policy and planning directions to the everyday activities of decision makers and town government, provides metrics to measure progress, and systems to make town government more effective and accountable.

Although the 2007-2017 Comprehensive Plan did not have a formal townwide vision (following the direction of Town staff at the time), all the comprehensive plans we have prepared since then are based on a highly participatory process to develop a community-wide vision of the future and a set of principles to guide both the planning process and implementation of the plan. The vision and principles are the "constitution" of a comprehensive plan and will have the same role in the Wellesley UP. A community planning process has three basic parts:

- » **IMAGINE:** Vision and Principles – a consensus on our shared destiny. What are our values? What kind of community and place do we want to be in the future? What do we want to preserve and what do we need to change?
- » **PLAN:** Goals and Strategies – goals, policies for decision makers, and strategies to reach the goals. How can we achieve the vision?
- » **ACT:** Implementation actions – with identified priorities, responsible parties, a timeline, and resources. How do we get started?

Core Team, Technical Team, and Advisors

The Stantec team is composed of a core leadership team, a technical team, and a group of advisors.

- » The core team for the Unified Plan will be composed of Larissa Brown, Jane Wiseman, and Daphne Politis. They will coordinate their work to ensure a holistic and integrated planning process and document. Larissa will have overall responsibility for the entire project and for comprehensive planning, including the work of the technical team. Jane will focus on the town

government strategic plan. Daphne will have responsibility for organizing and implementing the community engagement program, in collaboration with other members of the team and supported by Stantec staff.

- » The technical team will consist of Stantec's UPG staff of planners, urban designers, and landscape architects. In addition, Stantec will call on advisors in infrastructure and transportation to contribute to the plan: Alan Cloutier and Frank Holmes.
- » Our advisory group includes two subconsultants in addition to in-house resources. Bonnie Heudorfer of Bonnie Heudorfer Consulting, who worked with Larissa on Wellesley's 2007-2017 Comprehensive Plan, will provide housing relate information. Peter Kwass of Peter Kwass Consulting, will provide economic development advisory. Our form-based zoning advisor is Craig Lewis, a member of Stantec's UPG, who has prepared a number of form-based zoning codes, and finally, Drew Leff of Stantec has many decades of experience in our region working with public, private and institutional clients on real estate and development issues.

Comprehensive Plan Update

We will evaluate and build on existing plans to cover all the required and requested elements of the comprehensive plan while giving special attention to the most complex and cross-disciplinary challenges faced by the town. The plan will identify strategic opportunities and provide conceptual master plans for several of these areas in order to demonstrate how the integration of land use planning, market analysis, urban design, mobility and infrastructure improvements, green infrastructure and sustainability initiatives can work together to make the whole greater than the sum of the parts. Finally, we will provide an implementation matrix combining the comprehensive plan and town strategy plan showing the What, How, Who, When, and How Much of the plan's strategies and actions.

Town Government Strategic Planning

Our team lead for this work, Jane Wiseman of the Institute for Excellence in Government, has both created and implemented strategic plans in government. In developing the Town government strategic plan she will work with the Steering Committee, with boards and commissions, and with town staff. Her approach is to begin with a scan of best practices in order to incorporate evidence-based practices as consistently as possible. One key aspect of the strategic planning process will be to improve communications and transparency by making it easy to share more information about government operations among town public bodies and Wellesley residents and stakeholders. Through sharing data and performance management information, the Town's board and commission members, staff, and the public can understand at a glance how Town entities are functioning. Useful open data projects and new ways to enhance transparency in government can be created for communities of all sizes. Examples include the City of Boston's Data Boston (<https://data.cityofboston.gov/>) and open budget application (<http://budget.data.cityofboston.gov/#/>); the City of Los Angeles public data mapping portal, GeoHub, (<http://geohub.lacity.org/>); the Town of Arlington's Open Checkbook (<http://openbooks.tylertech.com/arlington/TransWebPages/Home.aspx>); the Town of Barnstable's Open Budget (<http://barnstable.budget.socrata.com/#!/year/default>); and the Town of Littleton's economic development self-assessment tool (http://www.littletonma.org/filestorage/19479/28346/21259/37181/Littleton_EDSAT_Report_04.27.16.pdf) Our team will bring the best in current thinking to this project.

Community Process

We see the planning process as a partnership with the Town and with community members. We develop comprehensive master plans through an iterative process that ensures regular communication, both digital and face-to-face, with community residents and other stakeholders as the plan is developed. In addition to communication

between stakeholders and the planning team, it is also very important that the process include opportunities for community members from different parts of town and representing different interests to talk to each other about the future of the Town. The Steering Committee will be the continuing arena for those conversations, along with public meetings and online discussions. Our process emphasizes both community members and individual expression of ideas and proposals.

We have used a wide array of strategies to engage communities, and we tailor our engagement program to each community. The broad principles that guide our approach include:

- » Make it interactive, enjoyable and meaningful
- » Create opportunities for people to speak to one another as well as to the planners
- » Provide opportunities for people to give their individual ideas
- » Provide opportunities for people to discuss their individual ideas and work together to identify priorities
- » Provide a range of options for participation that are widely publicized and geared to including the range of diversity of the demographics that constitute a municipality's population (e.g., ages, ethnic/linguistic groups, business community, environmental advocates, etc.)
- » Develop an outreach and participation plan with multiple and innovative methods for engagement throughout the process
- » Use multiple platforms and be redundant, for example, by providing online exercises that mirror face-to-face workshops
- » Provide both high tech (on-line) and no tech options (e.g., comment boards in prominent locations where people can write their ideas onto post it notes)
- » Meet people where they are (e.g., at events, senior/community centers, etc.)
- » Demonstrate that we are listening by documenting and showing how public participation and comment has been

incorporated, questions have been answered, principles have been respected, and that the community process has guided and influenced the final plan.

Our team is highly experienced with all types of face-to-face and digital outreach and engagement. These opportunities include highly interactive workshops and charrettes, drop-in open houses, pop-up events, survey and survey design, focus groups, "walkshops", use of keypad polling, meetings-in-a-box, e-blasts, videos, activities for children, and door-to-door engagement. Our digital engagement toolbox includes websites, interactive portals, on-line mapping, scenario trade-offs, and online document review,. We often partner with community organizations in our public engagement programs.

According to a Pew Research Study , 48% of U.S. adults have never attended a public meeting in their lives. Only 11.4% of U.S. adults attend any public meeting over the course of a year, and only 9% of adults attend one public meeting per year. In recognition of this, the Outreach and Participation Plan must include a wide range of methods—from no/low tech to high tech– to reach and include a broad range of stakeholders in the process.

It is important to provide opportunities to participate at discreet key points in the process (e.g., public meeting, focus group, etc.) but also opportunities that do not require attendance at a specific time and date (e.g., on-line conversation, survey, comment boards). It is also important to reach out to different demographics in different ways (in the ways that reach them the most effectively). It is important to identify local media and other ways of communicating that are specific to Wellesley such as newsletters, email lists, cable TV, school backpacks, existing Town Facebook and Twitter accounts.



WORK PLAN

Overview

As the prime consultant, Stantec will have overall responsibility for management of the entire consultant team and the writing and producing of the Unified Plan. Larissa Brown, PhD, AICP, will be the project director and manager for Stantec. Daphne Politis, AICP, of Community Circle will lead the organization and implementation of the community engagement process. Jane Wiseman will focus on town government strategies. The Stantec technical team will provide specific expertise, as will our advisors for infrastructure, transportation, economic development, housing, and real estate analysis. Key team members will participate in the community process and all members of the team will contribute to developing the overall strategies for the plan. Should grant funds be made available for a Community Health element of the plan, Larissa Brown and Daphne Politis, both of whom have experience in preparing health and human services elements of plans, will take charge of that element.

Stantec expects to meet regularly with the Town project manager and communicate as needed through email and telephone. We have found that it is useful to have a weekly telephone call to discuss project progress and issues.

Flexibility in allocation of resources and restricted funding

Community-based planning projects respond to issues that emerge from the community participation process, sometimes requiring rebalancing of activities. In collaboration with the Town, Stantec may identify the need to shift resources within the project in order to meet unforeseen needs as the project progresses. However, we understand that the funding for the Unified Plan will include Community Preservation funds that must be expended for historic preservation, housing, and open space/recreation purposes and that similarly, grant funds may become available for a health element. We will organize the work to align with these funding requirements and appropriately account for the funds.

Expectations of assistance from the Town

The consultant requests that the Town provide a staff person who will act as project manager and principal liaison to coordinate all aspects of the project with the consultant team. The project manager and the Town will be expected to assist the consultant team as needed in the following ways:

- » Providing access as needed to demographic and socio-economic data, GIS datalayers and map projects, assessor's data, regulations, previous planning documents, stakeholders' contact information, and so on

- » Assistance in making data and information held by other governmental bodies available to the consultant, as needed
- » Suggesting interview and focus group subjects, and potential members for working groups
- » Scheduling and providing space for interviews, focus groups and committee/subcommittee meetings
- » Logistics for public meetings, including identification and provision of Town-owned meeting space at no cost to the project
- » Attendance at Steering Committee and Working Group meetings
- » Attendance and assistance at public forums, workshops, and open houses
- » Documenting comments and requests for revisions during public review.

mobile-optimized websites and interactive online opportunities. Providing on-line opportunities for engagement also helps us to reach some demographics that otherwise are difficult to engage. At the same time, we recognize that some people do not have access to or prefer not to use online resources. The public engagement program, therefore, must be as diverse as the people we are trying to reach.

Daphne has worked in a wide range of municipalities with “hard to reach populations” and depending on the population has developed several techniques for reaching them. In addition to providing a range of options for participation that are widely publicized and accessible, she develops strategies to reach different target populations, such as seniors and youth. Different forums, modes and styles of communication may be necessary to reach a diverse audience.

Public Engagement Program Overview

In collaboration with Stantec, Daphne Politis of Community Circle will organize the public engagement program and be responsible for outreach. Daphne is highly experienced in developing and implementing community participation programs, both face-to-face and digital. Digital engagement has become increasingly important for busy residents, and we provide

We often invite the youth of a municipality to participate, both for their fresh ideas, and as a way attracting the attention of the adults. Town festivals and events are also excellent outreach opportunities.

Daphne will be supported by Stantec’s UPG and IEG’s Jane Wiseman will also participate in selected public events. Stantec’s UPG has developed and implemented outreach programs for multiple projects, and organized and facilitated hundreds



of interactive workshops and charrettes. We have interviewed and collaborated with a diverse array of local officials, stakeholders, neighborhood groups, and other community-based organizations in Massachusetts and around the country. Because of this long experience, we are skilled in building consensus in a context of multiple client groups and interests and multiple stakeholders, as will be the case in the Wellesley project.

Similarly, Jane Wiseman has worked closely with government stakeholders in a variety of contexts to develop and reach consensus to make government more effective. As Assistant Secretary for Public Safety in Massachusetts, she was charged with creating statewide strategic plans for each of the grant programs funded by the United States Department of Justice and Homeland Security. She had lead responsibility in the state for facilitating community discussions among interested stakeholders in law enforcement, religious and advocacy groups around the implementation of new protocols for traffic stops resulting from the state's the racial and gender profiling law. She was also responsible for facilitating community-based discussions in several communities for sex offender management programs. She has taught community-based strategic planning for state and local justice program administrators. She currently consults and writes about government innovation, data-driven government and customer-driven government.

We expect to develop the final public engagement program in discussion with the Steering Committee. The program will likely include all or some of the elements below.

- » **Steering Committee (SC).** The Town of Wellesley will appoint a Steering Committee (SC) with representation from the Town's 27 public bodies as well as a broadly representative group of residential, commercial, educational, institutional and community interests. The SC is expected to have 40-45 members. There will be approximately 10 meetings of the SC .
- » **SC Working Groups.** Because of the size of the SC, we propose creating up to four smaller

subcommittees to work on specific issues or topics to be identified during the course of the planning process. They will work closely with the subconsultants as they develop preliminary documents for the Unified Plan. There will be 4-8 working group meetings.

- » **Interviews and focus groups with key stakeholders and Town staff.** Individual interviews and focus groups with stakeholders, both SC members and others, will help the consultant team in updating information and identifying important issues and areas of concern.
- » **Brand and Logo.** The consultant team will develop a name and logo for the project, to be approved by the Town, with up to three options and three revisions.
- » **Public workshops and meetings.** The planning process will include the following public events:
 - *Townwide Visioning Forum.* A town-wide interactive public meeting to develop a vision for the future will take place on a Saturday.
 - *Four Neighborhood Workshops.* The town's 8 precincts will be divided into 4 planning districts made up of adjacent precincts with similar character. The Neighborhood Workshops will focus on issues and opportunities specific to each district.
 - *Four topic workshops.* The topics for the workshops will be identified in collaboration with the Steering Committee.
 - *Four Neighborhood Open Houses.* Drop-in open houses (located as in the Neighborhood Workshops) will present planning directions for comment by residents and stakeholders. One may focus specifically on the Town Government Strategic Plan.
 - *One business breakfast or lunch meeting.* Business owners typically do not attend meetings in the evening or on weekends. We have found that an early morning meeting, breakfast, or a lunch, perhaps sponsored by the Chamber, Rotary, or other similar group, is more effective.

- *Townwide Forum on the Draft Plan.* In an interactive public forum, the consultant will present the draft plan and provide opportunities for public comment.
- » **Presentations to community organizations.** If invited by community organizations, the consultant will make presentations or prepare the Town project manager for presentations.
- » **Public hearings/presentations.** The consultant team will present the Needs Assessment and Vision to public bodies and Annual Town Meeting, and the draft Unified Plan to the Planning Board, the Board of Selectmen, and Annual Town Meeting.
- » **Draft documents available for public comment.** Draft documents will be posted on the web site and hard copies deposited at the Wellesley Main Library to provide opportunities for public comment.
- » **Public participation outreach.** Our team will use multiple avenues, digital and traditional, to inform the public about the project and public engagement events. The consultant team will also employ outreach methods such as email blasts, the Wellesley Townsman, partnerships with schools, community organizations and businesses, and presence at town events. We expect that SC members and Town staff will assist in spreading the word about opportunities to participate in the Unified Plan process.
- » **Steering Committee (SC) speakers bureau.** Stantec will work with members of the SC to visit boards and commissions, committees, and important community groups and organizations at key milestones in the planning process to promote participation, report on the progress of the plan, and seek input.
- » **Digital engagement**
 - *Web site.* The consultant team will design a web page for the Unified Plan process on the Town's web site or create a separate web site optimized for mobile use. It will provide for comments, discussions, sign up for notifications and for contacting the consultant team, as well as a calendar of events, and a library of images, data and documents for download and comment.
 - *Keypad polling.* At SC meetings and public events, keypad polling for certain topics will provide real-time results for the participants.
 - *Social media.* The consultants will work with the Town to use the Town's Facebook and Twitter accounts for public information and to keep up public interest, and we will seek similar opportunities from the Wellesley Townsman, organizations like Sustainable Wellesley, and other groups.
 - *E-blasts.* Through the web page, stakeholder groups, sign-ups at meetings, and other methods the consultant team will develop and maintain an email list to inform interested persons about project activities and documents.
 - *Flash surveys of public opinion.* The team will work with the Steering Committee and the staff to identify key issues for quick surveys of public opinion at intervals during the vision and planning process. These surveys will be online and mobile-optimized, so they can be sent to the project's email list. Options could include creating a regular schedule to send out short questions on specific issues.
 - *Media.* The team will also perform the following tasks, subject to consultation with the Town: press release drafting and dissemination to media, via web communications and to stakeholders on e-contact list; use of Wellesley social media resources for outreach; informational programming; and presence on talk shows and similar events.

1 Phase I: Project Initiation & Needs Assessment/Current Conditions Analysis



Time Frame:
August – November 2016

A. Project kickoff meetings and finalization of work plan

The consultant will attend kickoff meetings with the Steering Committee to discuss the project work plan, community engagement plan, and the project schedule. After these meetings, the consultant will finalize the work plan, including community engagement, and project schedule.

B. Brand and logo

Stantec will develop up to three options for a project name or brand and corresponding logo for approval by the Town, with up to three revisions.

C. Website

Stantec will work with the Town to create a dedicated section of the Town's website for the Unified Plan project or a separate project website. We can also set up an associated discussion site (*mySidewalk*, formerly *MindMixer*). Through the website, town residents will have interactive opportunities in addition to access to presentations, draft documents, maps and other graphics.

D. Social Media

The team will work with the Town to take advantage of social media opportunities in Wellesley, such as existing Facebook and Twitter accounts owned by the Town and the Wellesley Townsman. Our experience is that providing information for accounts with existing followers is more successful than setting up new accounts for a project.

E. Steering Committee Meeting #1 with the consultant team

We suggest that the Town convene the SC for an initial meeting to elect co-chairs and discuss any questions about the committee's role. Then, the refined work plan, community engagement program, and schedule approved by the Town's project manager will be sent to the members of the Steering Committee in advance of the first meeting with the consultant team leadership group. The team's leadership group will be composed of the overall project manager (Larissa Brown of Stantec), the community engagement leader (Daphne Politis of Community Circle), and the Town Government Strategic Planner (Jane Wiseman of the Institute for Excellence in Government). The business of this meeting will be to introduce the team, provide orientation to the planning process and discuss any concerns or issues with the work plans and schedule. We also expect to include exercises, likely with keypad polling, designed to identify characteristics of the group, areas of general consensus, and areas where there are differing opinions.

F. Needs assessment/current conditions: data collection and analysis

The needs assessment and inventory of current conditions tasks will proceed on two simultaneous and interrelated tracks as the team updates data and information for the comprehensive plan and the Town Government Strategic Plan.

1. *Data collection and organization.* The consultant team, with the assistance of the Town's project manager, as needed, will collect information and data including existing plans, GIS data and map projects, socio-demographic data, economic data, Town ordinances and regulations, Town department strategic plans, Town financial data, and current projects. The team will also seek other relevant information, such as master plans for the educational institutions in Wellesley. Data collection will include use of proprietary information when needed, such as ESRI Business Analyst, Claritas, or EMSI economic data.

2. **Interviews.** Members of the team will interview the members of the Steering Committee, town staff, and other key stakeholders. The interviews will take place individually or in focus groups organized around topics, and the content of the interviews will include both comprehensive planning issues and town governance issues. Because physical planning and governance issues can often be interrelated this will ensure from the beginning that this will be an integrated process for a unified plan. Assistance from the Town project manager will be needed to provide an interview space in Town Hall and in scheduling.
3. **Field visits and photo documentation.** The team will visit all parts of Wellesley to take photos and gain an understanding of different parts of the Town.
4. **Data and information analysis.** The team will update information and evaluate implementation of the 2007 Plan to identify and map conditions and trends in the Town for inclusion in the Needs Assessment Report. In addition, Jane Wiseman will prepare an issue brief on policy trends for towns similar in size and demographics to Wellesley. The issue brief will address trends in government innovation relevant to creating a Town Government Strategic Plan.

G. Draft Trends and Needs Assessment, with a summary “Wellesley At A Glance”

Based on interviews, field visits, and analysis of data, information and plans, the consultant will draft a needs assessment/current conditions report as well as a short, highly visual summary document with infographics, “Wellesley At A Glance.” The

draft needs assessment will include maps, charts, tables, and illustrations and will be provided to the Town Project Manager and the Steering Committee (SC) for review. The documents will identify continuity, future trends, assets, opportunities, and challenges facing the town, both in terms of its physical development and government effectiveness. The summary will include key facts and trends and identify critical issues facing the Town.

H. Steering Committee Meeting #2 – Needs Assessment and Visioning Forum

At this meeting the SC will review the Needs Assessment and discuss the proposed activities for the Visioning Forum.

I. Final Draft Needs Assessment and Wellesley At A Glance Documents

The team will make any needed revisions to the Needs Assessment and At A Glance documents and make them available on the website and in hard copy at the Wellesley Main Library.

DELIVERABLES:

- » Meeting(s) with staff project manager
- » Finalized work plan, community engagement plan, and schedule
- » Brand and logo
- » Web presence and social media set up
- » Interviews and focus groups with stakeholders
- » Needs Assessment and Wellesley At A Glance
- » Steering Committee Meetings #1 and #2



PHASE 2: VISION AND PRINCIPLES



Time Frame:
December 2016 – March 2017

Our team will work with the Steering Committee and the Town Project Manager to develop a kickoff program of interactive public events and associated digital activities after the completion of the Draft Needs Assessment Report. This set of events and opportunities for digital input will be promoted together through multiple channels, providing many ways to reach Wellesley residents and stakeholders.

We expect the proposed public engagement activities and events presented here to be refined and modified based on the results of the Needs Assessment and through discussion with the Steering Committee and staff.

A. SC Meeting #3

The team will send materials with details about the outreach program and the content of the events to SC members before this meeting. The meeting will focus on outreach and the organization and the proposed structure of the visioning events.

B. Townwide Visioning Forum

Daphne Politis, supported by Stantec, will organize and implement an interactive Townwide Visioning Forum to be held on a Saturday. Exhibits of analytical maps and other materials will be available for review. The Forum will begin with a brief presentation to set the context for the Unified Plan process, the challenges and opportunities that face the Town, and will include exercises with keypad polling that give participants the opportunity to see real-time responses by the group as a whole. This will then be followed by small group activities with facilitators. The meeting will be organized so that individual responses will be documented and participants will also be asked to identify priorities through group discussion. Participants will be asked to identify assets and areas of concern, both in terms of policy and places

to be located on a map. All groups will discuss the same questions; these will be conversational and designed to solicit shared values. Each participant will then have the opportunity to write a short personal vision for Wellesley and share it with their small group. This will be followed by a group priority-setting process. Finally, the small groups will present their priority results to the larger group. We will then take this input and develop a Vision Statement and related set of guiding principles and goals that will form the foundation of the Unified Plan.

C. Four neighborhood workshops.

After the Townwide Visioning Forum, Daphne, supported by Stantec, will organize and implement four interactive district workshops, with each district covering two precincts that are similar in character. The workshops will take place for approximately 2-1/2 hours on weekday evenings over the course of two weeks. Exhibits and handouts will be provided at each event. During the workshops, participants will have the opportunity to discuss and identify on maps the issues and priorities specific to their districts, as well as their thoughts about town government strategy and effectiveness. At each workshop there will be a brief presentation on current conditions in that area, along with information on relevant aspects of previous planning. Participants will work in small groups with facilitators and then report back to the group as a whole, with a final opportunity to rank overall issues and opportunities.

D. Business Community Breakfast or Lunch Meeting.

Peter Kwass of Peter Kwass Consulting, with support from Stantec, will organize a business community meeting, ideally in collaboration with the Chamber or another business organization. These meetings typically are most successful as breakfast or lunch meetings during the work week. The purpose of the meeting is to discuss the Unified Plan, identify issues important to the business community, and identify business people for potential additional interviews.

E. Digital workshops and mini-surveys

For those people who are unable to attend the visioning forum or workshops, the website will provide interactive exercises similar to those at the workshops for online submission of ideas, preferences, and priorities. These will be used to confirm, validate and refine the vision and principles developed based on the input received at the townwide visioning forum. Digital workshops widen the range of voices contributing to the plan and allow input from those whose schedules or mobility limit in-person participation.

We also expect to use mobile-optimized short surveys over the course of the visioning and plan development stage of the project. Wellesley stakeholders who sign up for these surveys will receive an email from time to time from the Unified Plan project with a link taking them to a survey of one to three questions, which they can easily answer on their smartphones.

F. Draft Wellesley Vision and Principles and Steering Committee Meeting #4

Based on the outcomes of the public meetings, and online comment, the consultant team will prepare a draft Vision and Principles statement for review by the SC. The consultant team will make revisions, if needed. The Vision and Principles will be presented in a miniposter in the form of an 11 x 17 one-page document with graphics showing the statement on one side and summarizing the process that led to

the statement on the other side of the handout. This document will be placed on the website and at the information hubs for public review, with outreach to encourage comment and distributed to Town staff and all public bodies.

G. Endorsement of the Vision and Principles by Town Boards and Commissions.

After committee and public comment and approval by the SC, the Vision and Principles will be presented to Town boards and commissions for endorsement as the official guiding framework of the comprehensive plan and the planning process.

H. Final Vision and Principles

The final Vision and Principles will incorporate any required revisions requested by the boards and commissions and approved by the Steering Committee (either through a digital approval process or, if needed, another meeting).

I. Annual Town Meeting presentation

The team leadership will present the Needs Assessment and Current Conditions Report, the community engagement process, and the Vision and Principles to Annual Town Meeting.

DELIVERABLES:

- » Outreach materials
- » Exhibits, handouts, PowerPoints for public meetings and to post on the website
- » (1) Townwide Visioning Forum
- » (4) Neighborhood Workshops
- » (1) Business Community Meeting
- » Digital workshop materials
- » Steering Committee meetings
- » Draft and Final Vision and Principles
- » Annual Town Meeting presentation



Phase 3: Plan Development



Time Frame:
March – December 2017

After endorsement of the Vision and Principles, we will work closely with the Steering Committee and staff to develop the elements of the comprehensive plan update, the associated town government strategy to achieve the vision, and the implementation and action plan. Through this process and further discussion with the Steering Committee, we will identify the issues that are the most complex and difficult to resolve or balance, and focus special attention on those difficult, high-priority issues. This may result in comprehensive plan elements beyond those required by the state or combined elements to highlight interrelationships. The description of the plan organization below will be subject to modification based on the public engagement process and discussions with the Steering Committee, Town officials, and Town staff.

During Phase 3, it is expected that there will be regular meetings of the Steering Committee or subcommittees/ working groups created from SC members to focus on particular issues. Town staff or especially knowledgeable stakeholders who are not members of the SC may also be invited to join a subcommittee/working group.

Proposed organization of the plan. The plan will be divided into sections containing one or more related elements. The introduction to each section will provide a summary of the main recommendations of the section and its relationship to other sections of the plan. Each element will include a set of goals, associated policies for decision makers, a set of key findings and challenges based on the Needs Assessment/ Current Conditions report, a summary of community priorities as gathered through public workshops, digital input, and SC discussions, and a set of strategies and actions to achieve the goals, with a priority ranking within the topic area covered by the element. Best practices in urban design, sustainability and resource-efficiency,

resilience, and equity considerations will be integrated throughout the planning process and the plan, and having more detailed discussion in particular elements.

We will build on existing plans and initiatives in order to ensure a strategic and coordinated approach to achieving the Wellesley vision. Recent work such as strategic plans created by Town departments, boards, commissions, and committees; the Route 9 enhancement study; North 40 Study; 900 Worcester Street study; the Open Space and Recreation Plan; and other local and regional plans, projects, and initiatives will all be reviewed carefully and integrated into the Unified Plan, as appropriate.

After the goals, policies and strategies have been developed for each element of the plan, the Steering Committee will go through a priority-setting process to reach consensus on identifying townwide high, medium and low priorities, which will inform the final section of the plan. This section will include three townwide elements: Future Land Use, Town Government Strategic Plan, and Stewardship and Implementation.

A. Develop goals, policies, strategies, and actions for the Unified Plan

The Unified Plan will cover all state-required elements as separate elements or integrated with other elements: goals and policies; land use; housing; economic development; natural and cultural resources; open space and recreation; services and facilities; circulation; and implementation. We expect that through the visioning process and work with the Steering Committee, we will identify the issues that are most difficult to resolve and involve require cross-cutting strategies and priority setting—and which will therefore require the most attention, discussion, and focus. This includes the development of systems to enhance Town priority-setting and decision-making, measure progress, and implement the Unified Plan.

Example Unified Plan Structure

The structure of the Unified Plan will emerge from discussions with staff and the Steering Committee, as well as the results of the visioning events. The structure below provides a potential organization of structure for the plan.

Executive Summary [Mini-poster (11" x 17") or short booklet]

How to Use This Plan

Part I. Setting the Stage

- » **Element 1 – Townwide Vision and Principles, Town Government Mission**
- » **Element 2 – The Community Speaks.** Description and results from the public engagement process.
- » **Element 3 – Wellesley At A Glance.** Summary of the Needs Assessment/Current Conditions Report (in full in an appendix).

Part II. Our Natural and Cultural Heritage

- » **Element 4 - Natural Resources and Environmental Constraints.** Building on the strategic plan and initiatives of the Natural Resources Commission, issues to be discussed include: landscape character; environmental assets and constraints; water resources protection; green corridors, existing and potential; conservation priorities.
- » **Element 5 - Historic Resources and Preservation.** Update historic resources, preservation initiatives, adaptive reuse, identification of preservation priorities.
- » **Element 6 – Open Space, Conservation and Parks Systems.** Building on the recent Open Space and Recreation Plan, issues will include walkable access and ParkScore (Trust for Public Land metric) level of service measures, maintenance and emerging recreation needs based on demographic or other changes, design principles, and priority setting.

Part III. How We Live

- » **Element 7 – Neighborhoods and Housing.** Analysis and recommendations on neighborhood character and housing, both market-rate and affordable; housing market demand and supply; forecast of future housing needs; continuing concerns about large houses in relation to character and the effectiveness of the large house review process; affordable housing, related state and federal requirements and guidelines, and innovative strategies such as community land trusts; and adaptive reuse of historic properties.
- » **[Potential element if funded] Community Health and Wellness.** Identify health conditions and future trends in Wellesley, activities of initiatives such as Healthy Wellesley, Town conditions and plans that support community health, measures of well-being across the community, and additional initiatives to support health and wellness.

Part IV - Prosperity and Opportunity

- » **Element 8—Economic and Commercial Area Development.** Overall economic development and support for the Town’s villages and commercial areas; identification of future economic opportunities, including for entrepreneurs and small businesses; redevelopment opportunities; strategies and actions to maintain the Town’s economic base.

Part V. Sustainable Systems and Networks

- » **Element 9—Mobility and Circulation.** Issues to be discussed include congestion, level of service and mitigation options; active transportation networks (pedestrian and bicycle); multi-modal level of service standards; complete streets, traffic calming and similar best practices.
- » **Element 10—Supporting Public Facilities, Services and Infrastructure.** Issues to be discussed include: municipal facility improvements; program evaluation, service delivery and program enhancements; water, sewer, and stormwater services and regulations, including green infrastructure.
- » **Element 11—Sustainability, Resilience and Green Practices.** Focus on energy- and resource-efficiency and renewable energy, climate change readiness and adaptation, and integration of natural systems into development. Issues to be discussed include: energy efficiency, renewable energy benefits and impacts, and practices such as green building opportunities; best landscape practices; Low Impact Development and green infrastructure stormwater management; climate adaptation planning.

VI. From Plan to Action

The final section of the plan brings together the physical planning recommendations from previous elements, the town government strategic plan, and the implementation plan

- » **Element 14—Land Use, Regulations and Community Design.** This element will include future land use principles; a future land use policy map/diagram; a future land use map (GIS) with generalized land use categories shown for all parcels of land; graphic concept plans or scenarios illustrating select exemplary opportunity sites; urban design principles and general guidelines; and zoning best practices.
- » **Element 15—Town Government Strategy and Stewardship of the plan.** Systems and procedures to enhance the effectiveness of Wellesley’s government and ensure that the plan remains a living document through use by Town government and regular public review, including integration of the Unified Plan priorities into departmental work plans and the capital improvement plan, structured communication, open data systems, benchmarks and metrics to monitor implementation, standards for compliance with plan policies, and procedures for plan amendments, revisions and regular updating.
- » **Element 16—Implementation Matrix.** Matrix of implementation actions, including capital improvements, keyed to the goals and strategies in the plan elements: What? How? When? Who? How Much? The matrix will identify priorities, existing resources, planning, and low cost/high impact actions.

B. Steering Committee and Working Group Meetings

During development of the Unified Plan first draft, the members of the consultant team will meet with the Steering Committee for discussion and guidance on plan elements. In addition, Working Groups focused on specific topics may be organized to include Steering Committee members, and, if appropriate, staff, representatives of regional agencies, and knowledgeable local persons who are not members of the Steering Committee.

C. Town government mission and effectiveness strategy

We admire the decision by the Board of Selectmen to develop and implement a Town Government Strategic Plan integrated with the comprehensive plan to create the Unified Plan. Given the wide variety of formats and styles currently used in the strategic plans of various individual department and commissions, an initial step will be to align the existing inputs into a standard format. We will work with the Steering Committee to provide a recommended template that departments and commissions will be invited to use to create strategic plans that will more easily feed into a Town-wide plan.

The vision for the future of Wellesley created as part of the Unified Plan will drive the Town-wide strategic plan. Further, the development

of goals and performance metrics for each of the components of the plan will be completed jointly. Additional activities for Town Government Strategic Plan, above and beyond what is already envisioned for the Unified Plan, will address the following objectives:

- » Evaluate the relative quality of services delivered by the town.
- » Evaluate current service levels and their relationship to current town priorities, finances, taxpayers and customers.
- » Provide a higher degree of understanding for decision-makers as they review services, facilities and governance based on priorities.
- » Articulate the value placed on high-priority services and the rationale if services are discontinued for lower-priority services.

Our team will provide guidance and advice on using data to assess quality of services provided by Town government leveraging best practices in the field such as stat programs. We will document best practices and provide reference templates and examples that will be helpful to Wellesley in evaluating the quality of services delivered by departments and commissions. We will provide benchmark data from other towns for selected activity areas. We will develop recommendations on improved processes for collection and analysis



of critical performance data so that the Town will be able not only to execute on top priorities, but also to share data with the public on progress toward goals. We will provide recommendations about the frequency and format of public reporting based on best practices as well as emerging promising practices among top innovators. This formal sharing of performance data will provide the infrastructure for discontinuing activities that are not providing results sufficient to justify their continued investment.

D. Four public workshops on topics of special interest

The team will organize and implement four public workshops on specific topics. The topics themselves will be selected based on discussions with the public and the Steering Committee as well as themes that may emerge during the research phase of the Inventory and Needs Assessment. Potential topics may include balancing development, conservation, and recreation; mobility and circulation; town government strategies; housing (affordability, teardowns, and other issues) and town character.

E. Public open houses on planning directions and digital input

As the goals and strategies are developed for the Unified Plan elements, the consultant team will organize and manage four public open houses in the four two-precinct districts to solicit public feedback on the planning directions that are emerging during the plan development process. These open houses will be drop-in events held in the evening over two weeks. At these events stakeholders can come to view, give their opinions

and discuss the strategies emerging in the topic-based comprehensive plan elements. The open houses will give them the opportunity to see how public input has been transformed into planning goals and strategies. These events will be organized with display boards showing the planning directions; self-directed exercises for participants to rank priorities; and the opportunity for participants to speak one on one with members of the planning team to give their thoughts about the emerging plan. These materials will also be posted on the web site in interactive formats that will make it easy to comment and identify priorities. Input from these sessions will be incorporated into the First Draft of the Unified Plan.

F. First Draft Unified Plan

The team will produce the first draft of the Unified Plan. The plan will include a variety of visual elements such as maps, diagrams charts, tables, and images (photos, photomontages, drawings, etc.).

DELIVERABLES:

- » Plan element outlines with goals and strategies for Steering Committee and Working Groups
- » Steering Committee and Working Group meetings
- » Outreach and implementation of topic workshops
- » Outreach and implementation of public open houses
- » Complete draft plan elements with goals, strategies, and actions, narrative, and graphics and first draft of the entire plan

4 Phase 4: Plan Review



Time Frame:
September – October 2017

A. Staff and Steering Committee Review of First Draft UP

The First Draft of the Unified Plan will be sent to staff and to the Steering Committee for review. The review of the UP will be accomplished in stages over up to four Steering Committee meetings.

B. Revisions and Creation of Approval Draft UP

The team will revise the First Draft Plan as directed by the Steering Committee and staff and prepare an “Approval Draft” that will be the draft for public review, and the approval process by the Planning Board and Board of Selectmen.

C. Preparations for second Townwide Forum

A second Townwide forum will be organized in order to present the Approval Draft of the plan to the public. The team will prepare exhibits, a presentation and exercises to elicit responses from the public. Digital, traditional and media outreach will be used to inform the public.

D. Second Townwide forum and public review month

At the public forum, the team will provide exhibits in the form of graphic presentation boards on the plan elements, with opportunities for public comment, and then present the plan. Participants, seated at tables, will be asked to complete exercises to respond to the major directions of the Approval Draft of the Unified Plan – both individually, and

together as a group at the table. The group exercise will require participants to exchange perspectives with one another as they consider the draft plan. The forum will also provide an opportunity for questions at the event.

This event will start a one-month public review period for the Approval Draft of the plan. It will be made available to the public for review on the web site, at the Wellesley Main Library and Town Hall, with outreach to encourage review and comment.

E. Documentation of public comment

All comments received through the web site or by any other means, will be documented by staff and the consultant. The comment document will be in the form of a matrix that will include columns for consultant response and recommendation on comments, and a staff recommendation to the Planning Board and Board of Selectmen. This documentation will be posted on the web site and provided to the Planning Board, and Board of Selectmen.

F. Presentation of Approval Draft UP to Town Public Bodies for endorsement

The draft will be presented to Town Public Bodies for endorsement in early 2018.

DELIVERABLES:

- » Revisions responding to staff and SC comment
- » Approval Draft
- » Outreach, materials, and implementation of second Townwide forum
- » Documentation of public comment
- » Presentation to Town bodies

5 Phase 5: Final Approval and Production



Time Frame:
February – March 2017

A. Presentation to Planning Board and Board of Selectmen

The team will present the Unified Plan to the Planning Board and to the Board of Selectmen for approval.

B. Revisions as needed and production of final plan after approval

Stantec will make any revisions required by the Planning Board and Board of Selectmen. The final plan will be an electronic version of the plan in PDF and editable format; GIS data in ArcView format; and one digital copy of tables, charts and graphs, images, maps, boards, PowerPoints and similar presentation materials in editable formats and PDF, as needed. One unbound and one bound hard copy will be provided, with additional copies to be printed and bound at cost.

C. Presentation of Unified Plan to Annual Town Meeting

Stantec will present the Unified Plan to Annual Town Meeting, expected to take place in late March/early April of 2017.

DELIVERABLES:

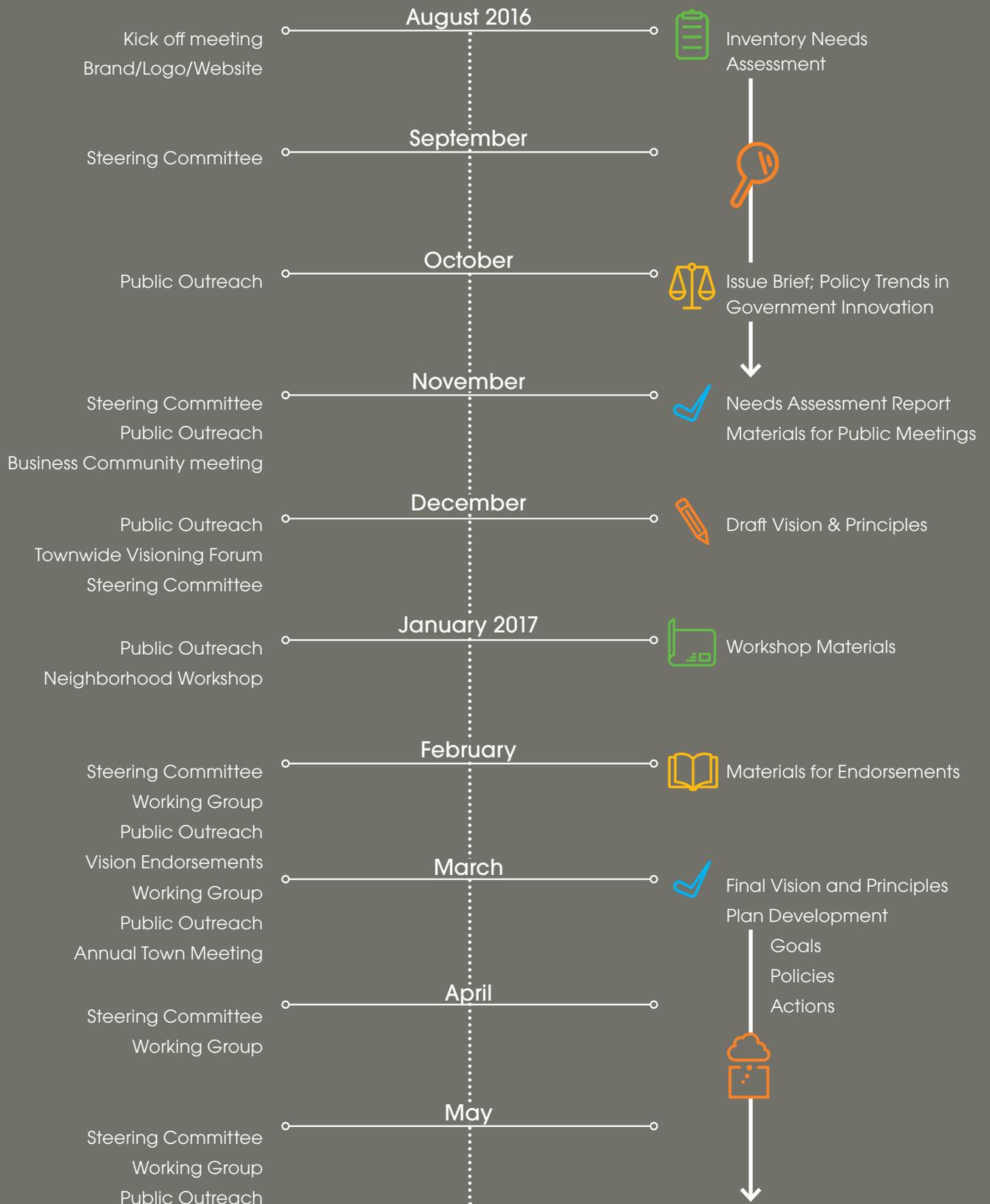
- » Presentations of the Unified Plan to the Planning Board, Board of Selectmen and Annual Town Meeting
- » Revisions, as needed, and final electronic and hard copies of the plan
- » Transfer of maps, boards, presentations and similar files to the Town.

Schedule

The following pages show our proposed schedule of tasks, public meetings, and milestone deliverables.

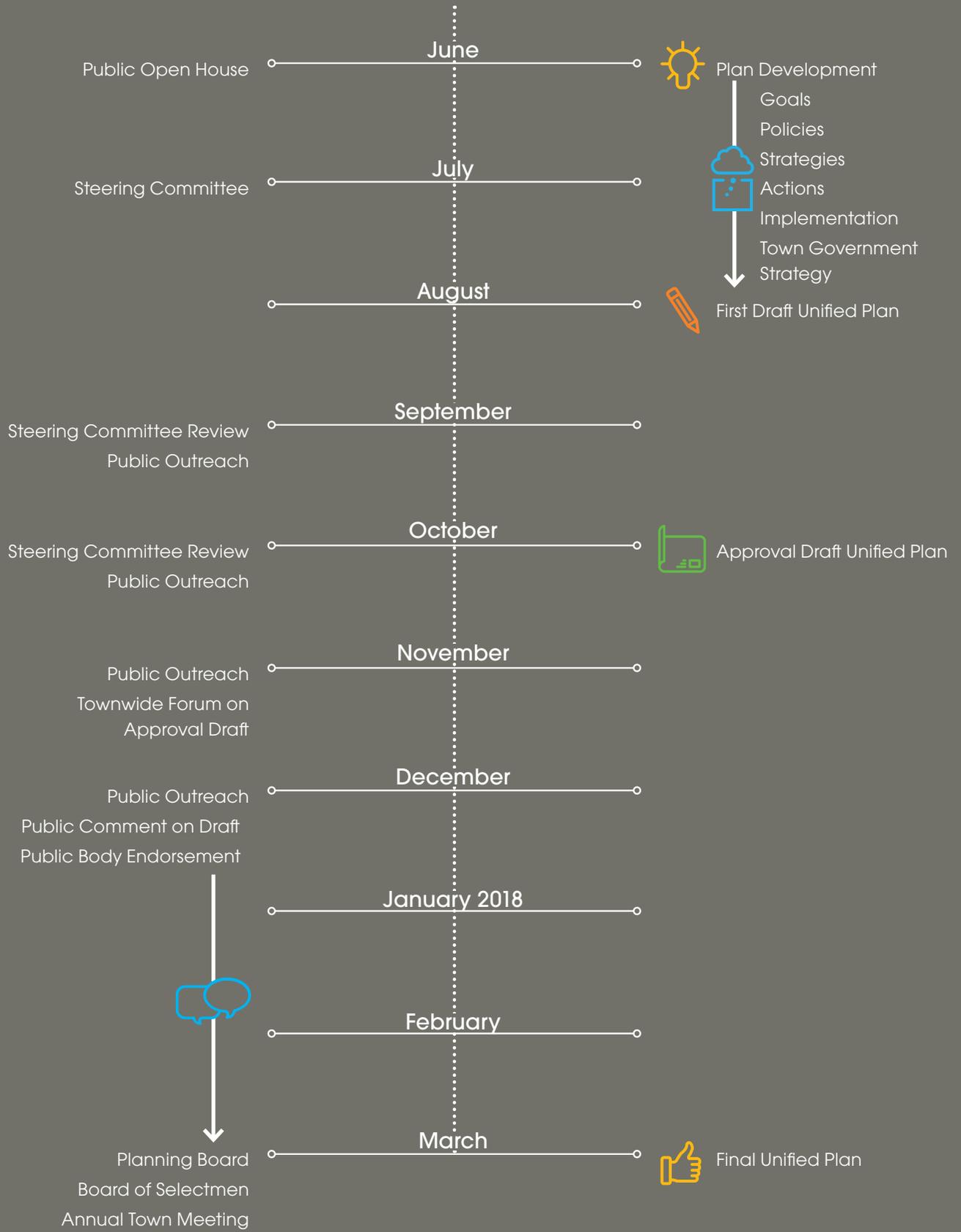
Outreach–Meetings–Approvals

Unified Plan Development



Outreach–Meetings–Approvals

Unified Plan Development

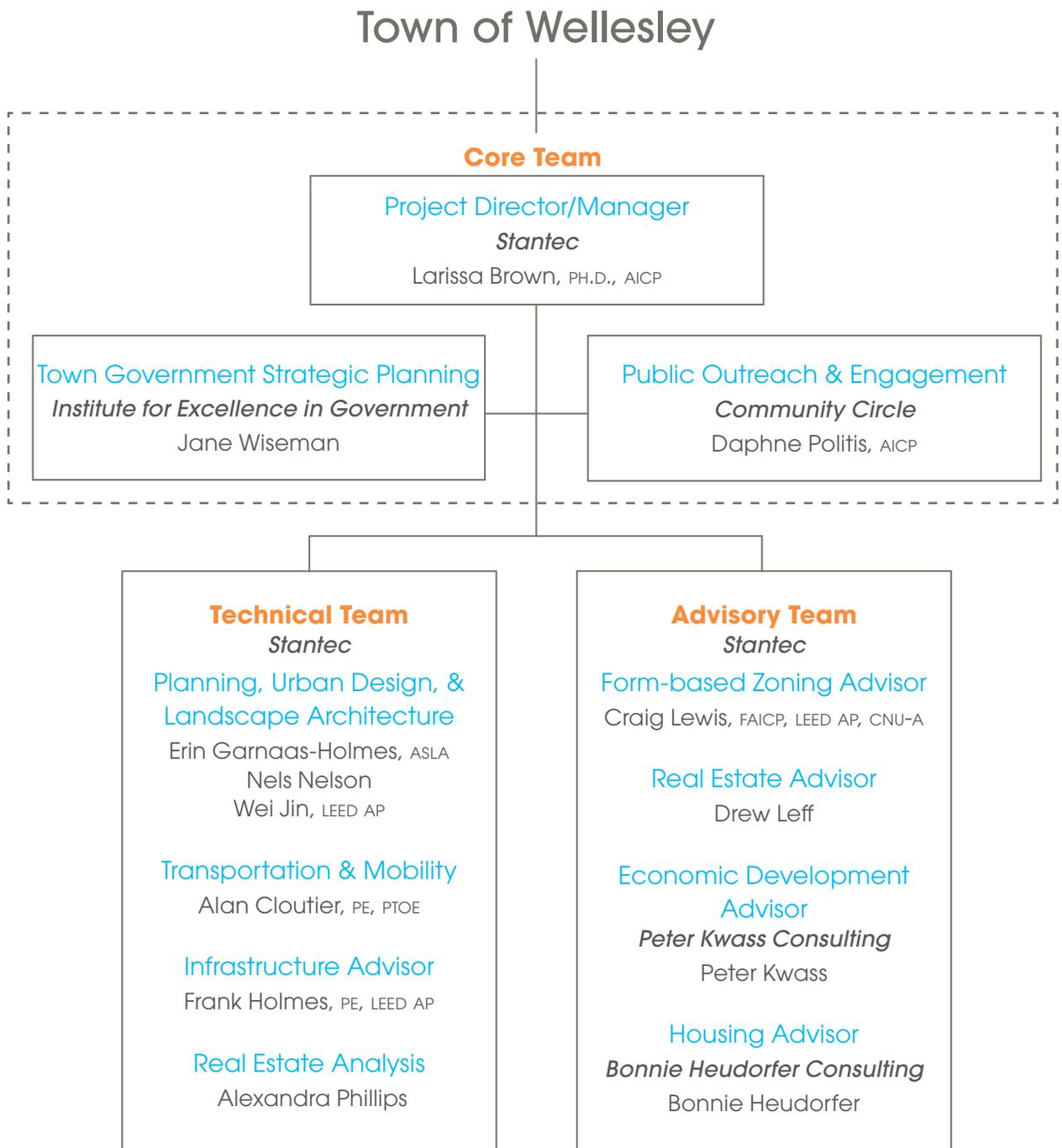




Team Resumes, Prior Experience, & References



STAFFING PLAN





Larissa Brown PH.D., AICP | PRINCIPAL

PROJECT DIRECTOR/MANAGER

A principal at Stantec's Urban Places Group, the planning and urban design practice within Stantec, Larissa is an experienced leader of large interdisciplinary teams working on complex, multi-stakeholder planning projects and is principal author of numerous award-winning plans. Larissa's work is inherently interdisciplinary, integrating land use and urban design with resilience and sustainability, market analysis and economic development, housing, transportation, and infrastructure. In a planning career of more than 20 years, she has led a variety of comprehensive, visioning, revitalization, neighborhood and corridor, open space, environmental, and housing plans for public, private, and nonprofit clients across the country. She served as a Subject Matter Expert and Facilitator at 2014-2015 Rockefeller Foundation-sponsored Resilience Academies for jurisdictions eligible for HUD's National Disaster Resilience Competition. Larissa's projects have won state, regional, and national awards from professional groups such as the American Planning Association, the American Institute of Architects, and the Congress for the New Urbanism. Larissa has worked as a municipal and regional planner, has served as a member and chairperson of a municipal planning board, and was a founding board member of a statewide smart-growth advocacy collaborative.

Registration

Certified Planner #015721,
AICP

Education

Ph.D., Urban,
Environmental and
Latin American History,
University of Virginia

M.A., Environmental
Landscape Planning and
Design, Conway School of
Landscape Design

B.A., Magna Cum
Laude, History, Princeton
University

Memberships

Member, American
Planning Association

Select Awards

National APA

2011 Hard-Won Victory,
City of New Orleans
Master Plan and
Comprehensive Zoning
Ordinance

National AIA

2007 Honor Award for
Urban & Regional Design,
Boston's Newest Smart
Growth Corridor

Selected experience

Wellesley Comprehensive Plan 2007-2017*, Wellesley, MA

Project director/manager for a comprehensive plan process focused on accommodating new housing that is more diverse in type and affordability in commercial areas while preserving character in traditional neighborhoods and green space resources.

City of Warwick Comprehensive Plan*, Warwick, RI

Project director/manager for a comprehensive plan for this coastal suburban city. Including extensive community participation and creation of new GIS data and maps, the plan includes strategies to connect green space, to work with the State on sea-level rise and other coastal issues and hazards, and to retrofit and improve conventional suburban development patterns through a focus on village centers, mixed-use redevelopment of strip malls, redesign of the regional commercial center to retain customers by reducing traffic congestion and improving aesthetics, and creation of an innovation district for redevelopment of underutilized older manufacturing sites centers.

City of New Orleans Master Plan and Comprehensive Zoning Ordinance*, New Orleans, LA

Project director/manager for the official citywide comprehensive plan and zoning rewrite to provide a 20-year shared framework to take the city beyond Katrina recovery to become a 21st-century model of the resilient city. With intensive public outreach and participation, and special focus on creation of policies for a citywide housing framework, economic development, infrastructure, resilience, sustainability, citizen participation structure, and implementation structures. Implementation of the adopted plan includes zoning changes to reflect the plan, a focus on resilience, code enforcement reforms, additional planning for the Claiborne Expressway corridor, and other initiatives.

Plymouth Strategic Action Plan*, Plymouth, MA

Project manager for a smarter-growth policy framework and strategic action plan, based on the comprehensive plan. The plan focuses on managing growth in sensitive areas while promoting economic development and compact residential growth in the fastest-growing municipality in the state. The concise document was designed to communicate effectively with residents who would have to vote on regulations and investments based on the framework that reflected the comprehensive plan.

Mansfield Tomorrow Comprehensive Plan & Zoning Ordinance*, Mansfield, CT

Project director to create a 20-year comprehensive plan and new zoning ordinance for the Town of Mansfield, CT, which includes the flagship campus of the University of Connecticut in the village of Storrs. Funded by a federal Sustainable Communities grant, the plan focused on balancing the rural character of much of Mansfield with expected housing and other impacts of university-driven changes including expansion of the student body and a new technology business district, and infrastructure extensions. Recommendations include new approaches to denser development in areas served by infrastructure and natural resources protection zoning approaches in rural character areas.

City of Birmingham Comprehensive Plan*, Birmingham, AL

Project director and manager for the first comprehensive plan in 50 years for Birmingham. Through an unprecedented public participation process, community members defined their top priorities. To respond to these concerns and aspirations, the comprehensive plan focuses on linking economic development, education, and workforce development; identifying strategies for transit improvements and transportation alternatives linked to the creation of transit-ready compact, urban villages; and a comprehensive strategy of land banking, redevelopment, and community greening to revitalize neighborhoods and reduce blight.

Shreveport-Caddo 2030 Master Plan*, Caddo Parish, LA

Project director/manager for a 20-year master plan for a planning area of 300 square miles and 230,000 people, including the City of Shreveport. Based on extensive public outreach and participation, the plan focuses on a transition from sprawl to smarter growth through expanding economic opportunity and improving quality of life. The plan includes elements on downtown, waterfront and inner-core revitalization, development of a signature green network with natural stormwater management and urban agriculture, infrastructure investments, and reform of the regulatory system.

City of Fontana General Plan Update, Fontana, CA

Project director leading a local team updating the General Plan for this city of over 200,000 people in California's Inland Empire. An extensive public engagement program includes visioning and thematic workshops, working groups, district open houses, a public opinion survey, and citywide events. Fontana became a suburban bedroom community with a logistics industry cluster over the last generation. The plan focuses on how the city could accommodate more growth in the future, become a full-service urban center with more jobs and economic diversity, improve older areas of the city, and align with the state's planning framework that calls for compact, walkable, and transit-friendly centers. Expected adoption 2017.

State APA and AIA

2014 APA RI Award for Comprehensive Plan, City of Warwick Comprehensive Plan

2014 APA AL Award for Outstanding Comprehensive Plan, City of Birmingham Comprehensive Plan

2012 APA LA Award for Comprehensive Planning, Shreveport-Caddo 2030 Master Plan

2011 APA LA Award for Comprehensive Planning, City of New Orleans Master Plan and Comprehensive Zoning Ordinance

2008 TX Society of Architects, Planning Award, Tyler 21 Comprehensive Plan, City of Tyler

2007 APA MA Outstanding Planning Award for Comprehensive Planning, Town of Wellesley Comprehensive Plan

**Denotes projects completed with other firms*



Jane Wiseman

TOWN GOVERNMENT STRATEGIC PLANNING

Education

Master of Public Policy,
John F. Kennedy School
of Government, Harvard
University

B.A., Government, Smith
College

Memberships

Board Member, Smith
Student Aid Society,
Northampton

Board Member, Rappaport
Center for Law and Public
Service

Board Member, Disability
Law Center

Selected experience

Institute for Excellence in Government, Boston, MA (2013-Present)

Provide business process improvement services to government and non-profit clients. Provide planning and coaching support to cities receiving innovation grant funding from Mayors Challenge ideas competition of private foundation. Provide technology research and writing services to Inter-American Development Bank. Provide research and strategic planning support to Pretrial Justice Institute.

Oracle Consulting, Senior Director, Burlington, MA (2012-2013).

Provided strategy consulting services to public sector clients to improve organizational performance and operational excellence. Developed market strategy and solution offerings for justice and public safety market. Advised Chicago Police Department, the San Francisco Police Department and the San Francisco District Attorney on technology implementation and predictive analytics projects.

Strategic Thinking Group, Private Management Consulting Practice, Boston, MA (2006-2011).

Provided management consulting services to public and private sector clients on strategy development and organizational change issues. Selected client engagements include:

- *Suffolk University: Lecturer, Advanced Research Methods for graduate students in government. Course includes all phases of the quantitative and qualitative research process from creating the research question and hypothesis to gathering and analyzing data and presenting results.*
- *Federal agency: Conducted training for senior managers on strategic planning, measuring outcomes, leadership, and effective organizational change. Provided coaching on development of new initiatives.*
- *University of Massachusetts Medical Center: Created strategic planning toolkit for new business opportunity assessment. Provided strategic positioning advice to consulting practice, assessing strengths and weaknesses of consulting offerings, and comparing to benchmarks and competitors.*
- *The Chautauqua Institution: Developed marketing and outreach strategy and provided project management support for development of an online learning community, leveraging social media.*
- *United States Department of Justice, National Institute of Justice: Developed budget management strategy guidelines for police departments to address fiscal challenges. Final report published July 2011.*
- *National Criminal Justice Association: Created strategic planning how-to web site for state agencies and provided training on strategic planning methodology.*
- *National Governors Association: Prepared publication describing management issues for state DNA laboratories in attracting and retaining quality staff and in assuring quality of service delivered.*
- *IBM Global Business Services: Provided positioning and strategy advice for business development efforts in state and local government law enforcement and public safety practice.*

- *Beacon Consultants Network: Conducted cost benefit analysis for reduction of carbon dioxide emissions that would result from the purchase of new technologies and switching to hybrid vehicles.*
- *StockShop, LLC: Analyzed spending patterns and prepared cost cutting scenarios. Developed pro forma financial models and business overview for potential funders. Advised on organizational and management issues. Developed strategy for outreach to business partners for government contracts.*
- *Commonwealth of Massachusetts Executive Office of Economic Development: Wrote publication-ready documents on energy policy and the benefits of streamlined municipal permitting processes.*

Commonwealth of Massachusetts Executive Office of Public Safety (EOPS), Assistant Secretary, Boston, MA (2003-2006).

- *Provided policy advice and analytical support to Secretary regarding management and administration, performance measurement, and effective use of technology.*
- *Created Research Division for statistical and policy research in support of executive decision-making.*
- *Responsible for direction and management of \$100 million portfolio of federal and state grants. Grant program accomplishments include:*
 - » *Re-organized grant-making Programs Division using best practices from other states. Was recognized by Pioneer Institute in their Better Government Competition.*
 - » *Implemented first-ever electronic grant application process for Homeland Security grants.*
 - » *Through aggressive targeting of grant funds, increased seat belt usage each year, and made specific gains among high-priority target groups.*
- *Co-facilitated working group to implement research on state Racial and Gender Profiling law.*
- *Developed research-based best practice approach for anti-gang grant program. Created research partnership program to foster collaboration and to inspire innovative approaches based on data.*

Accenture Strategic Services for Government, Senior Manager, Wellesley, MA (1998-2003).

- *Helped United States Department of Commerce achieve top ranking in performance measurement.*
- *Developed eProcurement Strategic Plan for State of Michigan. Responsible for financial modeling for cross-subsidy and self-funding projects for state government eProcurement practice.*
- *Helped develop Business Continuity Strategy for United States Postal Service to assure no interruption of mail service during millennium changeover.*
- *Performed cost-benefit analysis for Massachusetts eGovernment strategy.*

United States Department of Justice, National Institute of Justice, Director of Strategic Planning, Washington, DC, (1995-1998).

- *Led process to create agency budget and develop new policy initiatives.*
- *Created process to develop first ever agency performance measures.*
- *Led re-engineering project that decreased grant processing time from 350 days to 65 days.*
- *Re-engineered publication process for more timely release of research results.*

United States House of Representatives Committee on Appropriations, Staff Assistant, Washington, D.C. (1997 budget season).

- *Helped develop \$21 billion appropriations bill through quantitative analysis of funding scenarios.*
- *Proposed new program ideas for community policing and youth drug abuse prevention.*



Daphne Politis AICP

PUBLIC OUTREACH & ENGAGEMENT

Registration

Certified Planner, AICP

Certified Mediator

Education

Master of City Planning,
Massachusetts Institute of
Technology

Master in Architectural
Studies, Massachusetts
Institute of Technology

B.A., Psychology, Magna
Cum Laude, Boston
University

Memberships

Member, American
Planning Association

Affiliate, Boston Society of
Architects

President, Massachusetts
Association of Consulting
Planners

Select Awards

2006 Lexington Chamber
of Commerce, Civic
Leadership Award

2000 Design Share Merit
Award

Daphne is Principal of Community Circle, a woman-owned business (WBE), which was founded in 1994. She is educated as a town planner, is a trained facilitator, and a certified mediator. She's also fluent in Greek, and has a working knowledge of Spanish. Daphne regularly leads efforts in town, city, and town center planning, master planning, public participation/education, facilities programming, planning for health and wellness, visioning and consensus building processes. Daphne has designed and led community education and engagement processes for over two dozen municipalities, subsequently developing implementation and plans for the majority of these. Community Circle is focused on asking the right questions of a wide range of stakeholders, and conducting the appropriate research – critical to the process of developing a useful, viable, and well-supported implementation plan.

Selected experience

Community Visioning and Comprehensive Master Plan, Acton, MA

Project Manager and Senior Planner for this major outreach project involving a six-month long outreach and participation process with the purpose of developing a vision and goals for the town's future. Outreach involved town-wide visioning sessions, focus groups with target populations, interviews, opportunities for input on a web site, comment boards, among other forums. The town's youth was also invited to participate in a number of ways including drawing, surveys, writing, movie making and song writing. Two town-wide mail and web surveys (one for residents and one for businesses) as well as a phone survey of a random sample of the town's residents were administered. A Comprehensive Community Plan that was based on the outcome of the Visioning phase was developed in Phase II of this project. This included an Implementation Plan that was developed working very closely with the Steering Committee and Town staff and provided in an interactive format on the internet. (This project was completed with Planners Collaborative, Inc.)

Master Plan for Town of Milton, MA

Project Manager/Senior Planner and prime consultant. The planning process was undertaken in two phases. Phase I was completed in June 2013 and resulted in a preliminary vision and set of goals. In Phase II, we conducted additional outreach to several hundred Milton residents, business owners, and town officials and staff to confirm and refine the vision and goals which form the foundation of the Master Plan. Next an inventory of existing conditions and an assessment of Town resources were conducted. An analysis of these resulted in identifying the key challenges and opportunities faced by the Town. Finally, an implementation plan outlining strategies and action steps to achieve the Goals and Objectives was prepared. (This project was completed with the support of MLL)

Moving Forward Master Plan, Southbridge, MA

Project Manager and Senior Planner for this master plan. While Southbridge is a town, it is characterized by urban core challenges. The master plan scope included addressing downtown revitalization, and economic development in a community devastated after it was abandoned by manufacturing. Methods to engage the community, which is 30% Latino ranged from reaching out in unconventional ways to people who have never attended a

public meeting (and holding these focus groups in Spanish) to holding discussions on Facebook and in on-street interviews. Innovative techniques included an interactive theatrical production that was organized in order to explore difficult issues such as racism. A series of 10 roundtable discussions were held with the purpose of bringing together relevant parties sharing common concerns so that they could help to inform the implementation plan and form partnerships that would help take the strategies to the next step. Sustainability was an important goal. (This project was completed with the support of CPA)

Additional Relevant Clients and Projects

- *Outreach for Zoning Review, Northfield, MA (w/RKG)*
- *Outreach for State Transportation Plan (w/Planners Collaborative, Inc.)*
- *Outreach & Planning for Roxbury Heritage State Park, Roxbury, MA (w/CHC)*
- *Outreach Program of Campus Center, Harvard University, Cambridge, MA*
- *Outreach Programming, Science Center Plaza, Harvard University, Cambridge, MA*
- *Master Plan for Northfield, MA (w/MLL)*
- *Community Transformation Grant: Health & Wellness: Concord, Acton & Carlisle*
- *Neighborhood Plan for Chinatown's Future, Boston, MA (w/Taintor & Assoc.)*
- *Health Impact Assessment, Chinatown, Boston, MA*
- *Outreach for Common Spaces Project, Harvard University, Cambridge, MA*
- *Master Plan for City of Fall River, MA (w/CPA)*
- *Master Plan for Town of Amherst, NH (w/CPA)*
- *Master Plan for Town of Holden, MA (w/CPA)*
- *Master Plan for City of Methuen, MA (w/Taintor & Associates)*
- *Outreach for Holyoke Transportation Plan*
- *Master Plan for Framingham, MA (w/Taintor & Assoc.)*
- *Outreach for Master Plan for Keene, NH (w/Taintor & Assoc.)*
- *Charrette for Belmont Town Center, Belmont, MA*
- *Reuse Plan for East Boston Camps Site, Westford, MA (w/Bill Giezentanner)*
- *Planning Assistance to MBTA Station Area, Rockport, MA (w/CPA)*
- *Town Center Plan for Medfield, MA (w/CPA)*
- *Master Plan for Somerset, MA (w/Taintor & Assoc., Inc.)*
- *Town Center Plan for Somerset, MA (w/Taintor & Assoc., Inc.)*
- *Master Plan for Town of Tyngsborough, MA (w/CPA)*
- *Master Plan for Town of Canton, MA (w/Planners Collaborative, Inc.)*
- *Master Plan for Town of Lynnfield, MA (w/Planners Collaborative, Inc.)*
- *Outreach for Master Plan for Portsmouth, New Hampshire (w/Taintor & Assoc.)*
- *Long Range Plan for Town of Concord, MA (w/Taintor & Assoc., Inc.)*
- *Master Plan for City of New Bedford, MA (w/Lozano, Baskin & Assoc. Inc.)*



Erin Garnaas-Holmes | DESIGNER



PLANNER, URBAN DESIGNER, AND LANDSCAPE ARCHITECT.

Erin is an urban planner and designer who is passionate about the triple bottom line: helping communities achieve economic growth while also addressing environmental and social concerns. Erin has experience designing urban districts, open space networks, complete streetscapes and public spaces, and he is an expert in sustainable infrastructure. Trained as landscape architect and an urban planner, he has worked on several strategic redevelopment plans to identify opportunities to bring ecologically sustainable and socially vibrant development to urbanizing environments. Before joining Stantec, Erin worked with non-profit, government and academic design and planning organizations that expanded access to open space and cultural landscapes.

Education

M.URP, University of Minnesota Humphrey School of Public Affairs

MLA, University of Minnesota College of Design

B.A., Macalester College

Memberships

Member, American Society of Landscape Architects

Selected experience

City of Fontana General Plan, Fontana, CA *Leads GIS mapping and analysis.*

City of Corpus Christi Comprehensive Plan, Corpus Christi, TX

Led GIS mapping and analysis of land use and transportation, production of maps and diagrams for city's comprehensive plan.

Downtown Brockton Strategic Action Plan, Brockton, MA

Urban planner responsible for phased design scenarios, public engagement, existing conditions analysis, mapping, implementation recommendations, graphic material and presentations for redevelopment of a historic downtown near a transit hub.

Go Boston 2030 Public Realm Planning Study, Boston, MA

Project coordinator, researcher and designer for a two-year study of Boston's public realm and the creation of an implementation guidebook for tactical public space projects. Part design guidelines and part encouragement piece, the research and guidebook establish a vision for Boston's public realm and empower residents to take on projects like parklets, block parties and interactive public art in Boston's streets and sidewalks. The Study will be adopted as part of the City of Boston's Go Boston 2030 transportation planning process.

Carter Playground, Boston, MA

Designed public spaces and outreach material for the reconstruction of a major Boston city park in partnership with Northeastern University. Consulted on and currently overseeing SITES accreditation for the 7-acre park including athletic fields, a playground and public plazas. Designed framework to use sensor technology to measure park performance and inform future design and programming.

Charles River Urban Swimming Area Feasibility Study, Boston, MA

Project manager and urban designer for a study of the feasibility of establishing a permanent swimming area on the shore of the Charles River near downtown Boston. Led a team of pro bono volunteers to evaluate design, engineering and programming opportunities and obstacles for several potential swimming sites.

** Denotes projects completed with other firms*

Minnesota's Network of Parks and Trails*

Planner for a study of opportunities to strategically connect and expand the state's network of parks and trails. Compiled data from public agencies and private sources to evaluate the impact of state funding on parks and trails and propose sites for future allocations.



Nels Nelson | PLANNER



PLANNER

Nels is passionate about helping cities and towns become happier, healthier, and more resilient. Nels is able to optimize and find synergy between factors that influence the development of urban places, including quality of life, resilience, and economic development. He has unique experience working with smart urban systems, closing energy and material cycles. After earning his masters degree in environmental management and technology, Nels has kept close ties to academia, developing curricula for and teaching at Wageningen University, the Rotterdam Academy of Architecture, and the Royal Academy of Art. As a Fulbright Fellow, 2011-2013, he managed green infrastructure projects with the City of Addis Ababa and the United Nations Development Program.

Education

Master of Urban Environmental Management, Wageningen University and Research Center

Fulbright Fellow, US State Department, Ethiopia, Africa

B.A., Art and Visual Culture, Bates College

Memberships

Member, Boston Society of Architects

Member, Board of Directors, Boston Cyclists Union

Selected experience

Fontana General Plan Update, Fontana, CA

Planner for the comprehensive general plan update for Fontana, an evolving city of more than 200,000 inhabitants in California’s Inland Empire. Nels had a leading role in client, team, and sub-consultant management, mapping, analysis, and documentation.

Union Square Redevelopment, Somerville, MA

Planner for a transformative new chapter of Union Square. Announcement of Green Line extension plans in 2006 prompted the City of Somerville to consider how it could use key parcels it owned to jump-start high-quality, transit-oriented development in the square, which had long struggled to succeed as an economic center. The city asked our team to analyze development potential for the three parcels. Under a second contract, we assembled a development strategy to promote the city’s vision for the district and to bring the city maximum return on its parcels. The strategy analyzed ownership patterns, the potential for public/private partnerships, infrastructure conditions, rezoning options, and real estate markets. It guided development of new zoning that encourages higher-density development—to build a market strong enough to support a healthy “downtown” retail and jobs district—and encourage coordinated development of scattered, underutilized parcels.

Burlington Comprehensive Master Plan Phase I*, Burlington, MA

Planner working with the town planners to create a new comprehensive master plan, including charrettes, public input, visual preference surveys, online stakeholder interaction, land use analysis, existing conditions analysis, open space analysis, and project branding.

Downtown Brockton Strategic Action Plan, Brockton, MA

Urban planner responsible for phased design scenarios, public engagement, existing conditions analysis, mapping, implementation recommendations, graphic material and presentations for redevelopment of a historic downtown near a transit hub.

Tampa Waterfront District, Tampa, FL

As a planner on the project, Nels is providing district, neighborhood, corridor and block-level planning and zoning; urban design; graphic and document design and illustrations; active transportation planning; open space planning; human wellness planning; and mixed use district planning services. The project involves developing an urban design framework for 40 acres (approximately 10 blocks) of walkable new development.



Wei Jin LEED AP | URBAN PLANNER & DESIGNER



PROJECT URBAN PLANNER AND DESIGNER / PLACEMAKING

Wei has experience on a wide range of architectural and urban design projects, ranging from campus planning and mixed-use development to residential planning and housing design. Her strong design skills and environmental sensitivities integrate physical design solutions with social aspects and natural systems. Wei has five years of professional experience in China as an architect working on projects from office buildings to residential complexes. She has also worked as the main designer on urban design projects in South Korea and Mexico.

Registration

LEED Accredited
Professional, USGBC

EDUCATION

Master of Urban Planning
and Master of Urban
Design, University of
Michigan

Bachelor of Architecture,
Wuhan Urban
Construction Institute

Select Awards

2014 APA National
Planning Excellence
Award for Innovation in
Economic Development
and Planning, East
Franklinton Creative
Community District
Revitalization Plan

2011 APA Louisiana,
Award for Comprehensive
Planning, City of New
Orleans Master Plan and
Comprehensive Zoning
Ordinance

** Denotes projects
completed with other firms*

Selected experience

Tampa Waterfront District, Tampa, FL

Urban designer for a mixed-use, walkable, 40-acre district in downtown Tampa, providing architectural concept design, site plans, aerial renderings and street level renderings.

Union Square Redevelopment, Somerville, MA

Urban designer for a mixed-use, higher-density, transit-oriented development district, including massing studies, architectural concepts, site plans, aerial renderings, and street-level renderings.

City of Corpus Christi Comprehensive Plan, Corpus Christi, TX

Provided concept plans, urban design framework, and visuals for two key opportunity sites in Corpus Christi.

Near East Side Neighborhood Master Plan*, Columbus, OH

Provided redevelopment and reinvestment master planning to shape a consensus-based investment strategy for an 800-acre urban neighborhood. The neighborhood has served as a major historic center of the African-American community in Columbus.

East Franklinton Creative Community District Revitalization Plan*, Columbus, OH

Provided urban design for a vision and implementation plan for transforming an underutilized 200-acre urban neighborhood adjacent to Columbus's central business district into a residential and commercial area for creative professionals. The plan received a 2013 Congress for the New Urbanism Honorable Mention.

San Antonio Housing Authority Neighborhood Master Plan*, San Antonio, TX

Provided urban design for a master plan for the Victoria Commons development, as well as a transformation plan and implementation strategy for the neighborhood. This included planning for the Authority's Wheatley Courts property, which was funded by and adheres to the core goals of HUD's Choice Neighborhoods program.

City of New Orleans Master Plan and Comprehensive Zoning Ordinance*, New Orleans, LA

Contributed to a citywide comprehensive plan and zoning revision to provide a 20-year shared framework for going beyond Katrina recovery to create a resilient city. Developed urban design concepts for the plan, citizen participation structure, and implementation plans. Winner of a 2011 National APA Award for Hard-Won Victory and a 2011 APA Louisiana Excellence Award.



Alexandra Phillips | ANALYST



REAL ESTATE TECHNICAL ANALYST

Alexandra has nearly five years of experience in the real estate industry. She worked for three years doing commercial real estate market research and analysis and managing projects for a data and analytics firm in Washington, DC. Alex recently moved back to her native Boston after completing a Master of City Planning with a Certificate in Real Estate Development at the University of Pennsylvania. Through this mix of studies, she gained a comprehensive understanding of the real estate development process from project conception to completion, and brings a unique perspective to her real estate analysis.

Education

M.A., City Planning,
University of Pennsylvania

B.A., Spanish, Emory
University

Real Estate Design and
Development Certificate,
University of Pennsylvania,

Memberships

Member, Urban Land
Institute

Selected experience

MassDOT Kneeland Street Development Disposition, Boston, MA

Served as real estate consultant for the redevelopment of Boston's parcels 25 and 26, which are adjacent to the Leather District and Chinatown neighborhoods. Facilitation of community meetings was provided.

DCAMM, Worcester Deep Dive, Worcester, MA

Analyzed all publicly owned property in the city to identify surplus parcels and buildings. Determined opportunities for disposition and redevelopment as part of Governor Baker's "Open for Business" initiative.

Financial Analysis of Catalyst Project, Brockton, MA

Provided financial feasibility analysis of a number of potential development projects including a Historic Tax Credit deal and a LIHTC development.

Atlantic City Equitable Development Plan*, Atlantic City, NJ

Developed a plan for the equitable development of the city for the Federal Reserve Bank of Philadelphia. As part of this process, Alex identified potential investments in the economy, human capital, and public realm.

Redgate Associates*, Boston, MA

Compiled information on the development pipeline in Boston neighborhoods. Assembled a report on potential development parcels near commuter rail in greater Boston. Researched comparable development projects to determine viability of our proposals. Assisted in RFP and budgetary tasks related to a Courtyard Marriott redevelopment project.

CoStar Group*, Washington D.C.

Supervised a team of ten researchers with clients comprising over \$3 million in annual revenue. Coordinated data verification, analysis, and publication of quarterly metropolitan market reports. Analyzed commercial real estate fundamentals and historical trends for Washington, DC market. Researched property information, lease transactions, and institutional sales comparables. Developed and maintained relationships with a portfolio of clients comprising \$1.5 million in annual revenue.

**Denotes projects
completed with other firms*



Craig Lewis FAICP, LEED AP | PRINCIPAL



FORM BASED ZONING ADVISOR

Craig has over 20 years of experience implementing the principles of smart growth, new urbanism, and sustainability through comprehensive community planning, form-based codes, urban design, downtown redevelopment, public/private partnerships, mixed-use infill and neighborhood design. He previously served as the Assistant Town Manager for the Town of Cornelius, NC and as a planner with the City of Belmont, NC. He is an engaging and informative speaker and skilled public facilitator.

Registrations

Certified Planner #014662, AICP

LEED Accredited Professional, USGCB

Education

Master of Public Administration, University of North Carolina

B.A., Political Science, University of North Carolina

Select Awards

2016 College of Fellows – American Institute of Certified Planners, Class of 2016

2010 Forty Under 40 - Class of 2010 (Charlotte Business Journal)

2013 Outstanding Sustainability Leader, Sustain Charlotte

Selected experience

Planning Ordinance Comprehensive Update*, Davidson, NC

Downtown Davidson is a lively, historic mixed use village center and also home to prestigious Davidson College. We were retained in late 2011 to make land use and code recommendations for future infill opportunities in the Downtown Area. We began our work with the preparation of a Diagnosis Report and Annotated Outline that outlined specific changes the code and case studies and examples of techniques to achieve the community’s goals. The subsequent code fully incorporates the principles of smart growth that won the Town the EPA Smart Growth Award in 2006 that balance open space protection with walkable neighborhoods and vibrant village centers.

UDO Diagnosis Report for Revisions to the Development Standards and Review Process*, Pinehurst, NC

The Village of Pinehurst engaged members of our team to help chart a path through a process that was encumbered by an unhealthy development climate; regulations that were overly-complex, confusing, and onerous; and a development review process that was arduous, and in some cases, unnecessary. Following weeks of stakeholder interviews and in-depth analysis of past development applications, we provided a detailed set of recommendations to advance both the development expectations and predictability.

Grand Station TOD Form-Based Code*, St. Louis, MO

Commissioned by Citizens for Modern Transit under a grant from the Missouri Department of Health, this project encourages transit-oriented development around an existing underdeveloped light-rail station near the Saint Louis University Campus. Because no plan was previously in place, we worked with key stakeholders to identify redevelopment opportunities and calibrated the code accordingly. As an overlay code, this tool will be available to property owners who request it when prepared to initiate a project.

The Beaufort Code*, Beaufort, SC

Following an award-winning Civic Master Plan in which we developed a detailed infrastructure investment and redevelopment strategy for every neighborhood in this 300 year old city, we prepared a form-based code to implement the vision. The code is a richly illustrated set of standard calibrated to the needs of this coastal city with a strong element of preservation and local vernacular sewn throughout its fabric.

Unified Development Ordinance*, Raleigh, NC

Members of our team served on the Code Studio team to provide a thorough diagnostic evaluation of the existing city ordinances and procedure. During the code drafting phase, we led the design process to create form-based standards for application in certain parts of the city as identified in the Raleigh Comprehensive Plan.

**Denotes projects completed with other firms*



Frank Holmes PE, LEED AP | PRINCIPAL



INFRASTRUCTURE ADVISOR

Frank has over 21 years of experience as project manager of site/civil engineering projects from initial project formulation through completion of construction. He is experienced in a broad range of civil engineering practices, with a focus on stormwater management. Other areas of expertise include sewer system and water systems analysis and design, as well as local, state, and federal permitting. He works closely with both civil engineers and landscape architects within the firm to produce innovative and functional designs, and he is also a leader in sustainable design and low impact development.

Education

M.B.A., Suffolk University

B.S., Civil Engineering,
Worcester Polytechnic
Institute

Registrations

Professional Engineer
#40203, Commonwealth
of Massachusetts

LEED Accredited
Professional, USGBC

Approved Soil Evaluator
#SE 1081, Commonwealth
of Massachusetts

Select Awards

2014 Boston Society of
Landscape Architects,
Merit Award,
Temple Beth Elohim

2012 Faith & Form/IFRAA
International Awards
Program for Religious
Art & Architecture, New
Facilities, Merit, Temple
Beth Elohim

2011 BSLA, Honor Award
Temple Beth Elohim

Selected experience

Waterstone at Wellesley, Wellesley, MA

Site design and permitting for mixed use project located on the Charles River, consisting of 141 residential units and 33,000 square feet of, retail/office space. Design of major gravity and sewer force main servicing approximately 1/3 of the Town of Wellesley. Permitting including Special Permits and Notice of Intent.

Temple Beth Elohim, Wellesley, MA *Project engineer for stormwater design/permits.*

Washington Street Reconstruction, Wellesley, MA *Engineer for design/permits.*

Athenahealth Campus Master Plan, Watertown, MA

Led the civil engineering for master planning effort to redevelop the campus, adding 250,000 sf of office use, retail, and a 1,600 car parking garage. The project focused on providing a publicly accessible pedestrian-oriented campus environment, with a focus on maximizing open space and providing public amenities. A robust and integrated stormwater management strategy was woven into the plan and is an important organizing element for the campus development. Infiltration and inflow mitigation in the municipal sewer collection system was identified and mitigation proposed. Included were local and state permitting support and town and community review.

Massachusetts State & Community Colleges Master Plans, Boston Region, MA

Master planning for Bunker Hill Community College and Massachusetts College of Art to formulate a conceptual vision and a physical framework for the future of the campuses, including short-term improvements as well as long-term possibilities.

Mount Holyoke College Waterfront Campus Master Plan, South Hadley, MA

Planning and schematic design for the enhancement of the waterfront area surrounding Middle Lake in the heart of the campus. The design concept integrates sustainable stormwater management improvements to reduce impervious areas, promote groundwater recharge, and improved water quality of stormwater discharging to Middle Lake.

Boston College Master Plan, Chestnut Hill, MA

Civil engineer for campus master plan, responsible for evaluation of water distribution, sanitary sewer and stormwater management systems with focus on sustainable approaches to stormwater management.



Alan Cloutier PE, PTOE | SENIOR ENGINEER



TRANSPORTATION AND MOBILITY ADVISOR

Alan has over 17 years of experience on traffic engineering projects specializing in the design and analysis of intersection and corridor improvements, bicycle and pedestrian facilities, and preparation and peer review of traffic impact studies.

Registrations

Professional Engineer
#46053, Commonwealth
of Massachusetts
#11230, State of Rhode
Island

Certified Professional
Traffic Operations
Engineer, Transportation
Professional Certification
Board Inc.

Education

M.S., Civil Engineering,
University of
Massachusetts

B.S., Civil Engineering,
Northeastern University

Selected experience

Transportation Master Plan, Dennis, MA

Responsible for preparing comprehensive transportation Master Plan for the Route 134 and Main Street corridors. The study included an assessment of existing and future traffic conditions and identified the levels of improvements required to accommodate various levels of future development. Conceptual design plans were developed for intersections and roadways within the study area.

Pedestrian and Traffic Study - Portsmouth Naval Shipyard, Kittery, ME

Project consisted of a substantial pedestrian and traffic study both on-site and off-site aimed at reducing the congestion and extensive delays that are currently experienced by shipyard employees. Analysis and Vissim video simulations were prepared for both existing conditions and improvements and included vehicles, bicycles and pedestrians.

Multi-Use Path Feasibility/Conceptual Design Study, Chelsea, MA

For the City of Chelsea and the Massachusetts Executive Office of Energy & Environmental Affairs, assisted in developing the feasibility/conceptual design study for a multi-use path located on the former CSX Grand Junction Secondary Track right of way. Tasks include evaluating multiple on-road bicycling options, conducting Bicycling Compatibility analysis and recommending the optimal routes. Intersection improvements to accommodate this increased usage were developed.

Cochituate Rail Trail Conceptual Design Study, Natick, MA

Traffic Engineer for the project to develop a conceptual trail design for the rail to trail conversion of a 2.4 mil segment of the Saxonville Branch of the former Boston & Albany Railroad. Tasks included evaluating road crossings and at-grade railroad crossing and determining the recommended treatments at each crossing.

Downtown Parking Study*, Southbridge, MA

As Project Engineer, undertook Downtown Parking Study that included an analysis of utilization of existing parking facilities, including on-street parking and public and private lots within the downtown area. Identified levels of compliance with existing parking regulations and recommended changes to better utilize parking facilities.

Salem Pilot Bike Route, Salem, MA

Developed design plans for an on-road bike route linking public parks within the City of Salem. The route consisted of a combination of marked bike lanes, shared lanes and a limited amount of existing off-road portions.

Blackstone River Bikeway Segment 7, Worcester, MA

Project Engineer for the design of a 0.8 mile shared use path segment adjacent to city streets; includes roadway reconstruction necessary to accommodate proposed bikeway.



Drew Leff | PRINCIPAL



REAL ESTATE ADVISOR

Drew Leff has more than 40 years of broad experience in planning, developing and managing a wide variety of real estate and economic development projects. He effectively bridges the private, institutional and governmental sectors, having worked as a developer for some of the country's largest real estate development companies; for some of the country's leading educational institutions; and for numerous government agencies. His work has involved the development and expansion of numerous university-related research parks, redevelopment of historic properties, and planning the reuse and disposition of numerous surplus properties and dormant public facilities. He has also consulted with numerous government agencies and institutions in assessing, planning, and advising them on their real estate and economic development needs and plans.

Education

M.B.A., University of Chicago

B.A., University of Chicago

Selected experience

City of Somerville - Union Square Development Potential and Development Implementation Strategy*, Somerville, MA

Assessed development potential and developed a strategy and action plan to realize private redevelopment of a downtown district.

US2 Associates - Union Square Development, Master Development, Somerville, MA *Assisting in the development of a 2.4M SF mixed-use development.*

Massachusetts Executive Office of Administration & Finance - Infrastructure Investment Incentive Program (I-Cubed), Somerville, Boston, Quincy, MA

Determined project feasibility and fiscal impacts for development at various sites based on applications submitted to the commonwealth.

Pittsfield - Gateway City Housing Needs and Development Plan*, Pittsfield, MA

Developed a strategy to address blight and high vacancy by turning vacant and blighted property into a major open space amenity along the Housatonic River, as well as infill open space uses and new housing.

City of Springfield - South End Revitalization Plan*, Springfield, MA

Developed a plan for the city's private redevelopment of the neighborhood and helped secure funding and managed the initial implementation program for improvements.

City of Somerville - Economic Development Plan*, Somerville, MA

Conducted a comprehensive demographic and development analysis to serve as a foundation for the City of Somerville's Master Plan.

DCAMM, Hurley Building Retail Market Analysis & Activation Strategy, Boston, MA

Performing a "Retail Market Analysis", by analyzing redevelopment opportunities, providing redevelopment scenarios including market issues, and assessing Commonwealth space needs.

DCAMM, Worcester Deep Dive, Worcester, MA

Identified surplus properties and determined opportunities for disposition and redevelopment as part of Governor Baker's "Open for Business" initiative.

**Denotes projects completed with other firms*



Peter Kwass

ECONOMIC DEVELOPMENT ADVISOR

Over 30 years' experience in local and regional economic development working with local, state, and federal governments, nonprofit organizations, foundations, and public-private partnerships. More than 165 projects completed in 37 states involving comprehensive economic development as well as workforce, entrepreneurship and small business, and community-based development. Competencies include research and analysis, strategic planning, and program design and evaluation, as well as presentation and facilitation, written communication, and project management. Strong commitment to rigorous analysis, thorough understanding of the community, and active stakeholder engagement to produce customized solutions.

Education

Master of City and Regional Planning (MCRP),
John F. Kennedy School of Government, Harvard University

B.A., American History,
Brown University

Board Experience

Fenway Community Development Corporation,
Boston – Member (23 years), President (3 years)

Groundwork Somerville –
Founder, Board of Directors (16 years), President (8 years)

Somerville Chamber of Commerce – Board of Directors (18 years)

Selected experience

Gloucester Harbor Economic Development Plan, Gloucester, MA

Peter Kwass led a consulting team that completed an economic development plan for this city's historic harbor district, the center of its economic and cultural life. Peter conducted all of the economic analysis and industry research, met regularly with a project advisory committee to present findings and facilitate discussions, prepared all public meeting materials and made all public meeting presentations, and authored the final report.

City of New Orleans Master Plan, New Orleans, LA

As part of a consulting team led by Larissa Brown, Peter Kwass led the preparation of the economic development component of the city's master plan. Peter prepared a detailed overview of the city's economic structure and recent performance; analyzed established and emerging economic base industries and identified new, sustainable industry opportunities where the city exhibited potential competitive strengths, and assessed the city's capacity in policy and program areas supporting economic development. He prepared recommendations for the development of key economic base industries, and for strengthening the city's "economic building blocks" through design of a new public-private partnership to lead local economic development efforts, and targeted strategies for business recruitment, retention and expansion, new venture creation, post-secondary education, and workforce development. As a result, the city's lead economic development organization established five industry councils to promote the development of key established, emerging, and new sustainable industries.

City of Corpus Christi Comprehensive Plan, City of Corpus Christi, TX

As part of a Stantec-led team, Peter prepared the economic development component of the city's Comprehensive Plan. A strong focus of the economic development component was diversification from dependence on the oil and gas industry. Recommendations involved assisting manufacturing diversification, building the research and technology transfer capacities of the city's leading higher education institution, tourism development, expanding entrepreneurship support resources, and retaining and attracting talent.

21st Century Warwick: City of Livable Neighborhoods, Warwick, RI

As part of a consulting team with Larissa Brown, Peter led the preparation of the economic development component of the city's Comprehensive Plan. Based on his analysis of the city's economic base and competitive strengths, Peter recommended that the city target its economic development efforts to several established and emerging industries.



Bonnie Heudorfer

**BONNIE HEUDORFER
CONSULTING (WBE)**

HOUSING ADVISOR

Since 2001, Bonnie has been practicing as an independent planning consultant, specializing in housing and community development. Her clientele includes government and quasi-public agencies, municipalities, nonprofit organizations, and academic and financial institutions. She offers communities a broad spectrum of services, including housing market analysis and needs assessments, affordable housing plans and implementation strategies, program evaluations, strategic planning and communications, and master planning.

Bonnie's past experience includes Senior Research Associate, Northeastern University's Dukakis Center for Urban and Regional Policy—where she was a principal architect of the Greater Boston Housing Report Card; Director of Community Reinvestment and Fair Lending, BankBoston/Fleet; and Director of Residential Development, Boston Redevelopment Authority.

Education

M.S., City and Regional Planning, Pratt Institute

B.S., Housing Interior Design, University of Connecticut

Memberships

Past President, Citizens' Housing and Planning Association

Former Chair, Harvard Housing Partnership

Co-Founder, Women's Institute for Housing and Economic Development

First Executive Director, Boston Housing Partnership

Selected experience

Regional Housing Plan (RHP) and Regional Analysis of Impediments to (AI) Fair Housing, State of Rhode Island

Consultant to the Office of State Planning for the preparation of two companion planning documents, both funded under the HUD Sustainable Communities Regional Planning Grant Program. (2013-2015)*

Regional Housing Plan (RHP) and Regional Fair Housing Equity Assessment (FHEA) for 164 Eastern MA Communities

Consultant to the Metropolitan Area Planning Council for the preparation of two companion planning documents, both funded under the HUD Sustainable Communities Regional Planning Grant Program. (2011-2013; updated 2015)*

Commonwealth of Massachusetts Analysis of Impediments to Fair Housing

Consultant to the Department of Housing and Community Development for the preparation of the state's The work product includes statistical data to identify impediments to fair housing to be addressed in the AI, and a written assessment of whether or not fair housing choice is limited, including through private and public conditions. (2013)

Commonwealth of Massachusetts 2005-2009 & 2010-2014 Consolidated Plans

Project manager/author of the state's 2005-2009 Consolidated Plan under contract to Department of Housing and Community Development. Key responsibilities included: preparing a market analysis and needs assessment; conducting regional meetings and focus groups with key stakeholders; assessing and quantifying housing and community development needs based on the analysis and community input; refining and prioritizing needs based on the community participation process; and drafting the plan. Consultant to DHCD when they moved the Consolidated Planning process in house for 2010-2014. Services included project design, research, writing, and editing of the final document.

City of Boston Analysis of Impediments to Fair Housing

Consultant to the Office of Civil Rights for the preparation of the City's 2009 AI.

**Sustainable Communities Regional Planning Grants provide support for metropolitan and multi-jurisdictional planning efforts that integrate housing and land use policies with economic development, transportation and infrastructure investments. The resulting housing plans are being incorporated into comprehensive long range plans by MAPC and the RI Office of State Planning. Fair housing and access to opportunity are key underpinnings of the Sustainable Communities initiative, and those assessments have been released as standalone documents.*



PRIOR EXPERIENCE

References for Stantec team leadership and subconsultants—Larissa Brown, Jane Wiseman, Daphne Politis, Peter Kwass, and Bonnie Heudorfer—can be found below. Selected examples of project experience follow on subsequent pages. The digital version of the proposal submission contains active links to plan documents.

REFERENCES

Stantec

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21st Century Warwick: City of Livable Neighborhoods

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(903) 531-1175 | hnicks@tylertexas.com
Tyler 21 Comprehensive Plan

Leslie Alley, Deputy Director

City of New Orleans, LA
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Plan for the 21st Century: New Orleans 2030 & Comprehensive Zoning Ordinance

Roy Jambor, Senior Planner

Shreveport Metropolitan Planning Commission
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Shreveport-Caddo 2030 Master Plan

Institute for Excellence in Government

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United States Department of Justice, Office of Justice Programs Strategic Planning Web Site

Edward Flynn, Chief of Police (supervisor)

Milwaukee Police Department
(414) 933-4444
Executive Office of Public Safety Programs Division, Process Improvement Plan

Susan Prosnitz, Esq., Acting Branch Chief for Policy, Planning and Outreach (peer)

Transportation Security Administration
(571) 227-1335
Executive Office of Public Safety Programs Division, Process Improvement Plan

Community Circle (WBE)

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Community Visioning & Comprehensive Master Plan

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Milton Master Plan

Cassandra Acly, Director of Economic Development and Planning

Town of Southbridge, MA
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Southbridge Master Plan

Peter Kwass Consulting

Steven Magoun, Director, Community Planning

Town of Watertown, MA
(617) 972-6147
Watertown Economic Development Plan

Carolyn Kirk, Mayor

City of Gloucester, MA
(978) 281-9700 | ckirk@ci.gloucester.ma.us
Gloucester Harbor Economic Development Plan

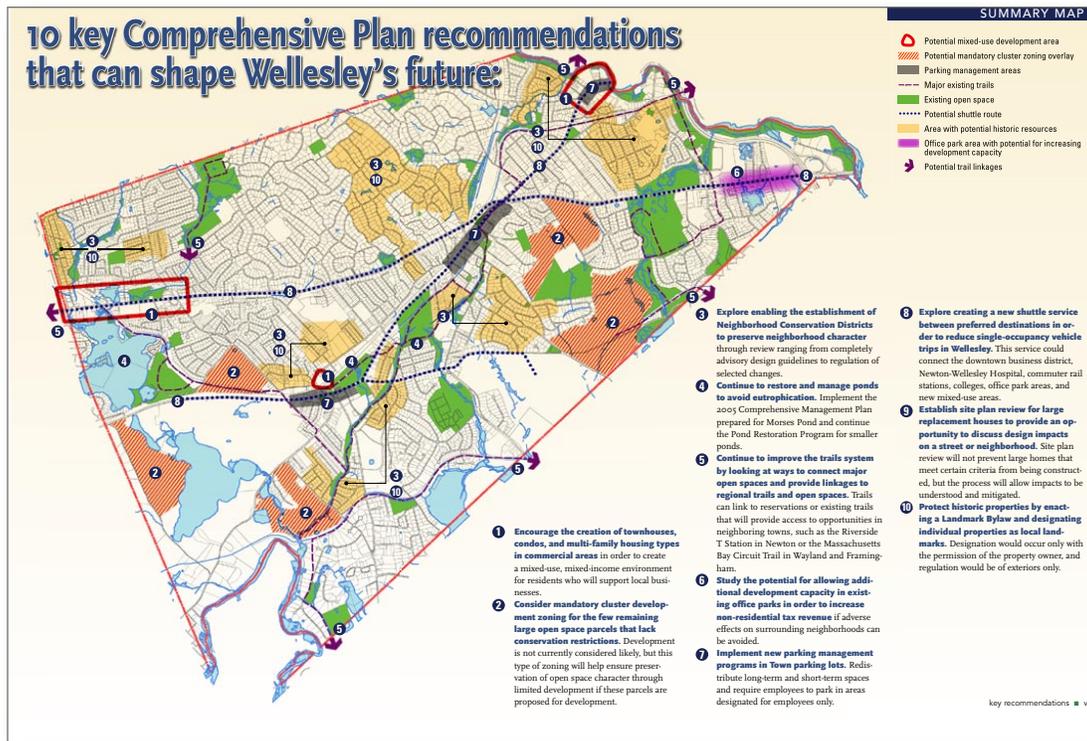
Bonnie Heudorfer Consulting (WBE)

Jennifer Raitt, Director, Community Planning

Town of Arlington, MA
(781) 316-3092 | jraitt@town.arlington.ma.us
MAPC Regional Housing Plan Update and Fair Housing and Equity Assessment

Brenda Clement, Executive Director

Citizens' Housing and Planning Association
(617) 742-0820 | bclement@chapa.org
RhodeMap RI Regional Housing Plan and Analysis of Impediments to Fair Housing



Services
2004–2006

Planning services

Wellesley Comprehensive Plan, 2007–2017 Wellesley, Massachusetts

The Town of Wellesley has a long tradition of planning which has helped it remain a very successful and attractive suburban town. Larissa Brown AICP, while at another firm, led the team that prepared Wellesley's 2007–2017 Comprehensive Plan Update in a two-phase planning process. Working with a Steering Committee made up of the Planning Board and Town Meeting representatives, she organized an extensive program of public communication and participation including a project web page and newsletters; seven public meetings – town-wide and by precinct; a meeting with business and institutional stakeholders; Steering Committee member visits to Town boards and commissions to report on the plan; reports to Town Meeting and the Board of Selectmen; and public review of the draft plan.

The plan encompasses all the required elements of a Massachusetts comprehensive plan, but the planning work was strategically focused on the most difficult and complex issues facing the town. These included the impact of tear-downs and mansions on neighborhood character; identification of development opportunities to diversify the housing types and provide affordable housing; continued preservation of village commercial districts; preservation of open space; and improved management of traffic and parking. This focused approach resulted in identification of three potential sites for redevelopment and nine mixed-use development scenarios. The plan also includes a detailed affordable housing plan; an inventory of open space; 19 maps; and an implementation chapter coordinated with the Town's capital plan. Implementation of the plan has included establishment of Neighborhood Conservation Districts, redevelopment of identified sites, and development review standards for large houses.

Results

Adopted & implemented



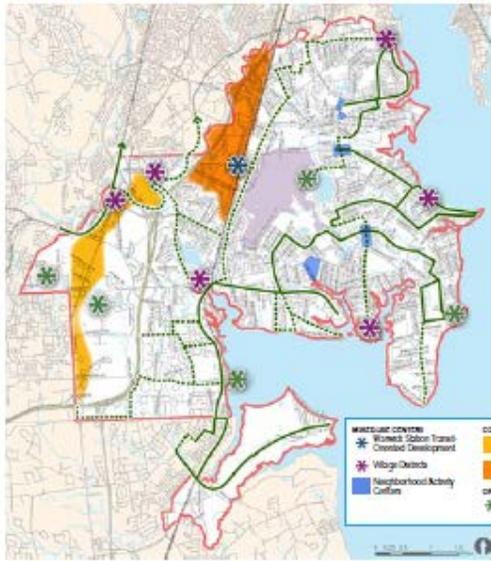
2007 Outstanding Planning Award for Comprehensive Planning, Massachusetts Chapter, American Planning Association

Plan Link



<http://www.wellesleyma.gov/Pages/FOV1-0001FDAB/draffinal>

Our Vision for 21st-Century Warwick



- **The Warwick Station District** as a vibrant live-work-play growth hub with mixed-use, transit-oriented development
- **Village and neighborhood centers** combining housing and shops in walkable environments
- **An Innovation District** for 21st-century business and advanced manufacturing
- **Design and esthetic improvements** to keep our regional retail corridor attractive and improve our neighborhood retail centers
- **More safe and convenient ways to walk and bike around the city**
- **Preservation, protection, and enhancement** of our open space, environmental resources, waterfront, and coastal waters for today and future generations.

“A connected, sustainable, and prosperous coastal city of livable neighborhoods and walkable villages... We are strengthening our city and community to meet the needs of current and new generations of Warwick residents.” —FROM THE VISION

“If we invest in the city, the city will give back.” —WARWICK RESIDENT

Services
2011–2013

Planning services

21st-Century Warwick: City of Livable Neighborhoods

Warwick, Rhode Island

Results

Adopted & implemented



2014 APA Rhode Island Chapter, Award for an Excellent Comprehensive Plan

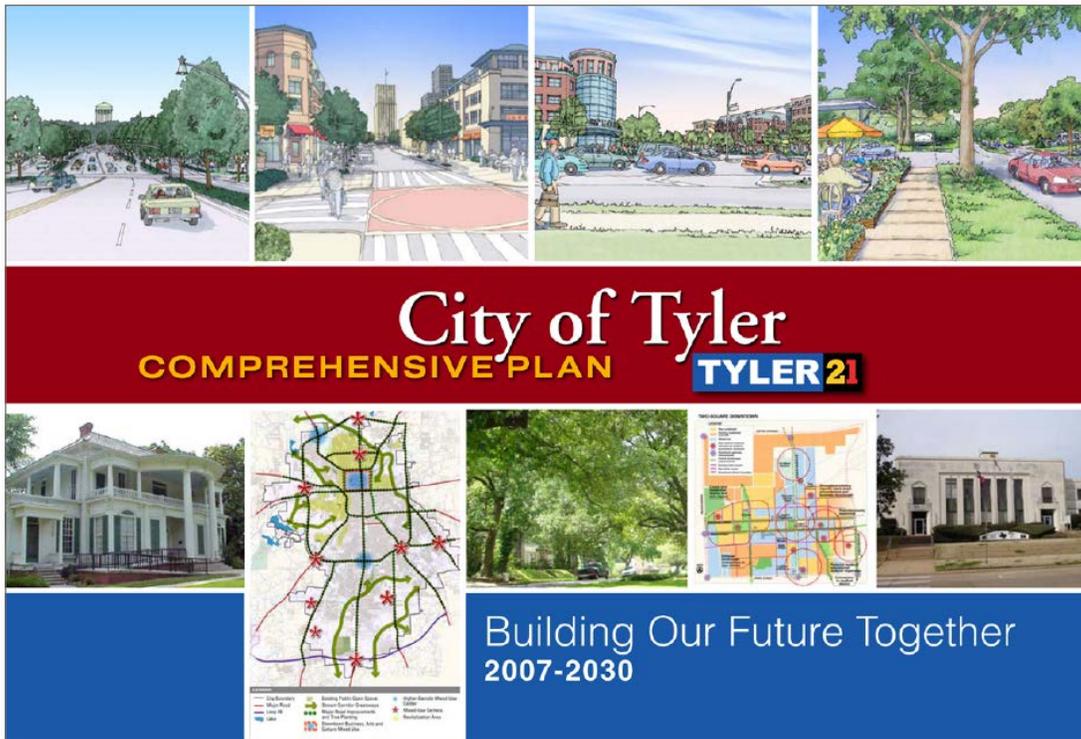
Plan Link



<http://www.warwickri.gov/planning-department/pages/comprehensive-plan>

A full update of Warwick’s comprehensive plan was prepared by a consultant team led by Larissa Brown while at Goody Clancy. The plan provides a framework for the city of 82,000 people to become a more connected, prosperous, and sustainable community, building on current efforts to enhance historic villages, promote transit-oriented development at the intermodal Warwick Station, and improve neighborhood quality of life. Along with elements on green systems, housing and neighborhoods, economic development, infrastructure and community services, the plan also provides recommendations on energy efficiency and resilience, particularly in relation to flood risks and coastal sea level rise. An extensive community engagement process included topic- and geographically-based public meetings and an online survey that attracted over 700 responses. In addition, the project provided Warwick with new GIS data. Major outcomes included:

- Investments in infrastructure for livability and economic vitality—multimodal transportation, water/wastewater system improvements, and telecommunications;
- A coordinated program to manage impacts of development in order to reduce and eliminate pollution in fresh and coastal waters;
- Walkable, mixed-use village centers add new living options to the city’s suburban neighborhoods of single family homes and provide new centers of community activity;
- Connected neighborhoods and community destinations, such as parks, coastline, schools and commercial districts, through pedestrian and bicycle routes;
- Modern and competitive regional and local technology and commercial districts through creation of the Warwick Innovation District and design improvements to regional retail districts;
- Transit-oriented development at the Warwick City Centre intermodal district;
- Strategies to work with the state on sea level rise and flooding.



Services
2006–2007

Planning services

Results

Adopted & implemented
Five-Year Update, 2013-14



2008 Planning Award,
Texas Society of
Architects, AIA Texas
Chapter

Plan Link



[www.cityoftyler.org/
Departments/Planning/
ComprehensivePlan/
Tyler21.aspx](http://www.cityoftyler.org/Departments/Planning/ComprehensivePlan/Tyler21.aspx)

Tyler 21 Comprehensive Plan

Tyler, Texas

Larissa Brown, while at Goody Clancy, led a team that prepared a 20-year comprehensive plan for a fast-growing city of 100,000 in East Texas. Tyler’s leaders recognized the need to shape the city’s growth to enhance quality of life and prosperity while preserving the small-town charm Tylerites value. Traffic congestion, downtown disinvestment, leapfrog residential development, dispersed employment centers, and an impoverished public realm—all consequences of sprawl development patterns—had raised increasing concerns in the community.

Based on an unprecedented public engagement process, we addressed all the traditional elements of a comprehensive plan while focusing strategically on key themes and issues critical to Tyler’s future. With strong support from the city’s leadership, we organized and led a series of public meetings to develop a community vision and principles to guide the plan, as well as topical working groups to discuss and review draft plan elements. We kept residents informed and gathered additional input through a robust website and a newsletter. The final plan recommended strategies for balancing growth, linking land use and transportation, and promoting connections to open space. It also contained special plans for downtown and other focus areas.

The city implemented two-thirds of our plan recommendations in the five years following its unanimous adoption by the City Council in late 2007 (the city did a five-year update in 2013-14, renaming the plan “Tyler 1st”). A Unified Development Code created as part of this project to reflect the new comprehensive plan was adopted in the spring of 2008. Implementation has included three area plans, transportation improvements, creation and implementation of an urban forestry program, creation of two local historic districts, and a variety of downtown revitalization initiatives, including renovation of a historic theater.



Plan for the 21st Century: New Orleans 2030 & Comprehensive Zoning Ordinance

New Orleans, Louisiana



Three years after Hurricane Katrina, the New Orleans City Planning Commission chose a team led by David Dixon and Larissa Brown, then at Goody Clancy, to prepare a citywide master plan and a new comprehensive zoning ordinance. The resulting plan was adopted by the planning commission and the City Council in 2010, and a zoning revision consistent with the master plan is complete. Many plan recommendations have been implemented.

The first post-Katrina initiative to go beyond recovery, the plan presented an integrated and holistic approach to “building back better.” Based on extensive work with stakeholders, the plan provided detailed strategies and actions, including conceptual development plans for key locations.

The citywide master plan goes beyond recovery to lay out a vision of livability, opportunity, and sustainability over 20 years for the city’s physical development and its social, economic, and environmental future. An extensive public participation program included citywide public forums, district meetings, open houses, working groups, and numerous meetings with neighborhood groups and other organizations. Implementation began in 2010.

Services

2008–2010

Planning services

Results

Adopted & implemented

Five-Year Update, 2016



2011, National Planning Achievement Award for a Hard-Won Victory, American Planning Association (APA)

2011, Louisiana Chapter of the American Planning Association Award for Comprehensive Planning

Plan Link



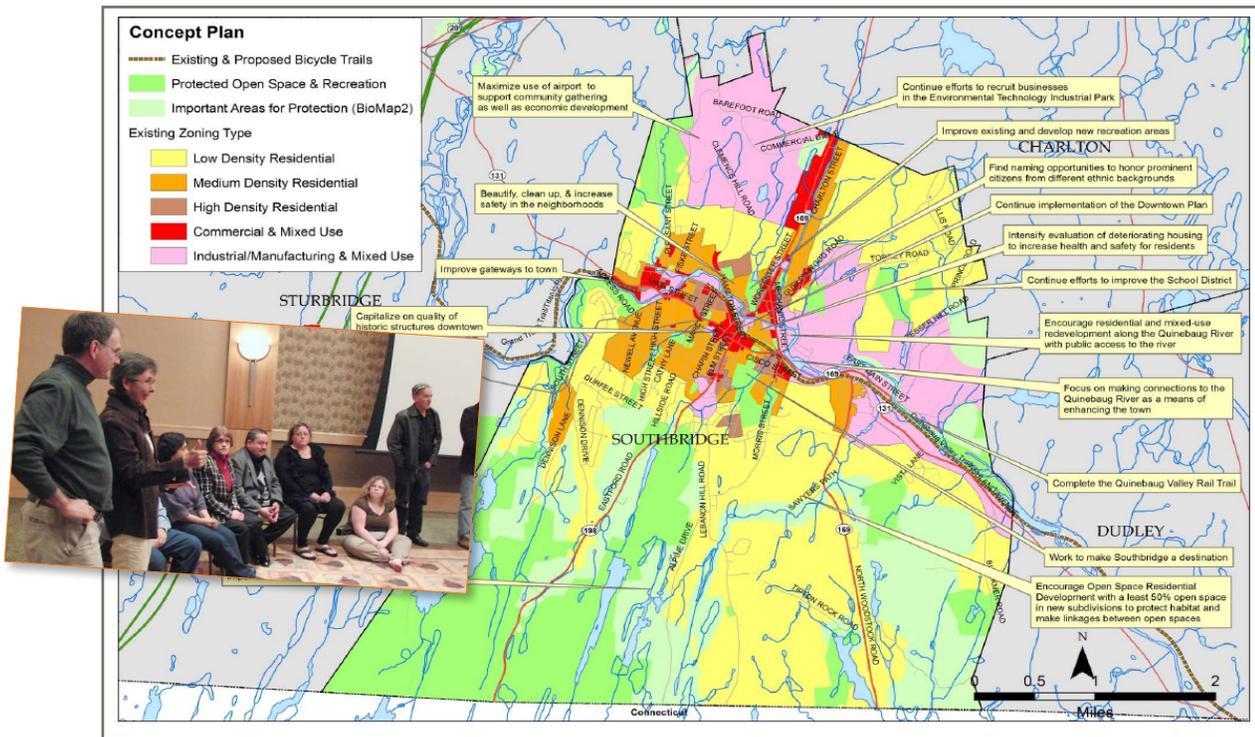
www.nola.gov/city-planning/master-plan

Livability. The plan focuses on reviving and sustaining vibrant and walkable neighborhoods; historic and cultural preservation that supports community; new neighborhood centers at transit hubs; and green infrastructure, parks, and greenways. Strategies include a comprehensive blight eradication; public improvements tailored to neighborhood conditions; and preservation program; and provision of decent housing for residents of all incomes.

Opportunity. The plan envisions a prosperous city through the alignment of job training and jobs for all skill levels, a dynamic small business base, and 24-hour activity that supports the downtown’s role as an economic driver. Strategies include business-school partnerships; a comprehensive one-stop shop for business permitting and assistance; and rewriting regulations to facilitate adaptive reuse in downtown.

Sustainability. Measures rely on a multiple lines of defense strategy in the face of sea-level rise; transportation choices; a “green” agenda of environmental strategy innovation; and, cost-effective public facilities and services. Strategies include creation of a department of environmental affairs; studies of new approaches to managing water, enhanced pedestrian and bicycle conditions; and a range of energy-efficiency, green building, and urban agriculture activities.

Two of the most important components of the associated comprehensive zoning ordinance are the incorporation of “place-making” standards and development regulations that further the city’s resiliency, to rebuild New Orleans in its established character as a sustainable city.



Services
2012-2013

Public engagement

Results

Adopted & implemented

Plan Link



http://www.ci.southbridge.ma.us/sites/southbridgema/files/file/file/southbridge_master_plan_volume_1.pdf

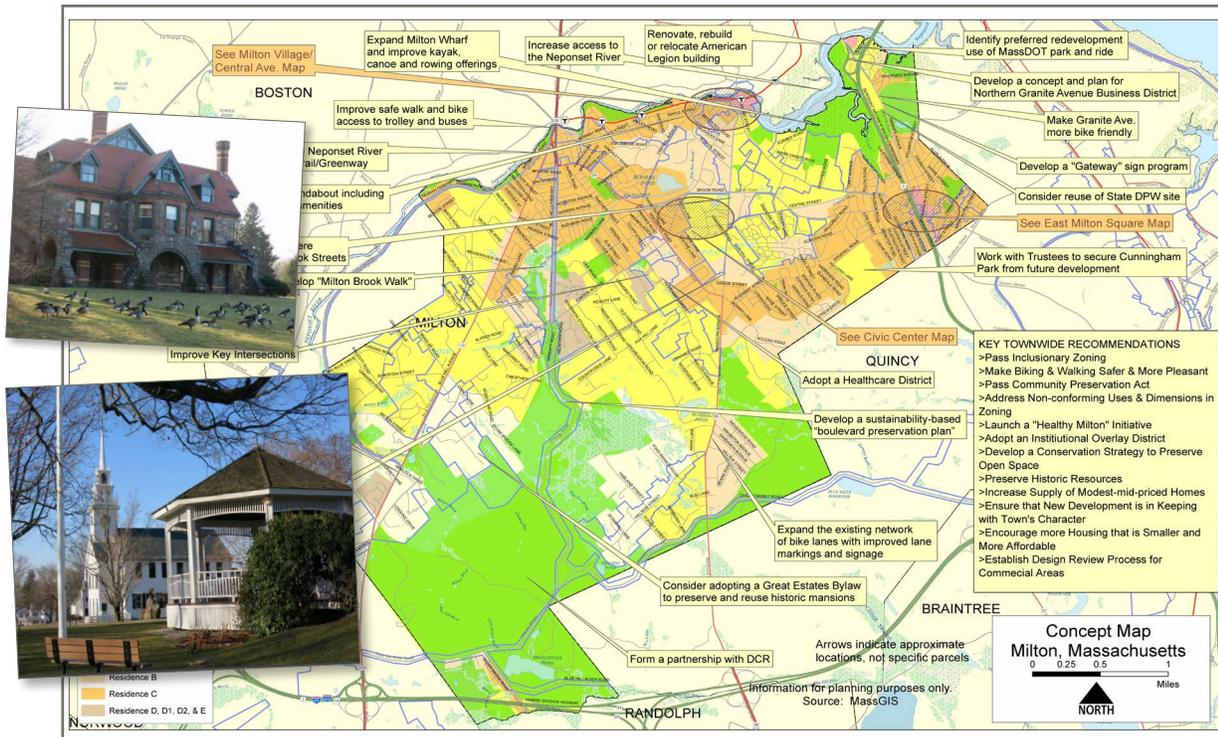
Moving Forward Master Plan

Southbridge, Massachusetts

Southbridge, once a booming manufacturing center in central Massachusetts, has lost population and economic activity. Community Circle completed a town master plan in 2013, working intensively with a sixteen member Master Plan Committee. In addition to the traditional master plan elements, the Plan addressed issues such as community health and community identity. Southbridge has the highest incidence of childhood asthma in the state and ranks very high statewide in other health problem indices such as teen pregnancies. Additional recommendations include supporting wellness by improving walking and biking infrastructure, restoring the school system's reputation and providing job training, as well as reviving the downtown and focusing on promoting recreational and historical resources in order to try to recapture the commercial activity the town once had.

Outreach and engagement included input from hundreds of residents, business owners, town officials, staff and volunteers, collected in a number of forums; including:

- Steering Committee Meetings
- Visioning Forums, including two in Spanish, an entire high school senior class at lunch at the senior center and meetings at a public library, elementary schools, and a social service agency
- Roundtable Discussions, including health and safety, sustainability, downtown revitalization, housing & neighborhoods, education, community pride, and business community/economic development
- Leadership interviews with town department heads, committees, and commissions;
- People-on-the-street interviews
- Project web page and Facebook activity
- "Playback Theater" event (interactive production followed by public workshop); and
- "Neighborhood Walk" with town administrator, department heads and residents



Services
2013–2014

Public engagement

Results

Adopted & implemented

Plan Link



[http://www.townofmilton.org/
Public_Documents/
MiltonMA_BComm/MP/
MP](http://www.townofmilton.org/Public_Documents/MiltonMA_BComm/MP/MP)

Milton Master Plan

Milton, Massachusetts

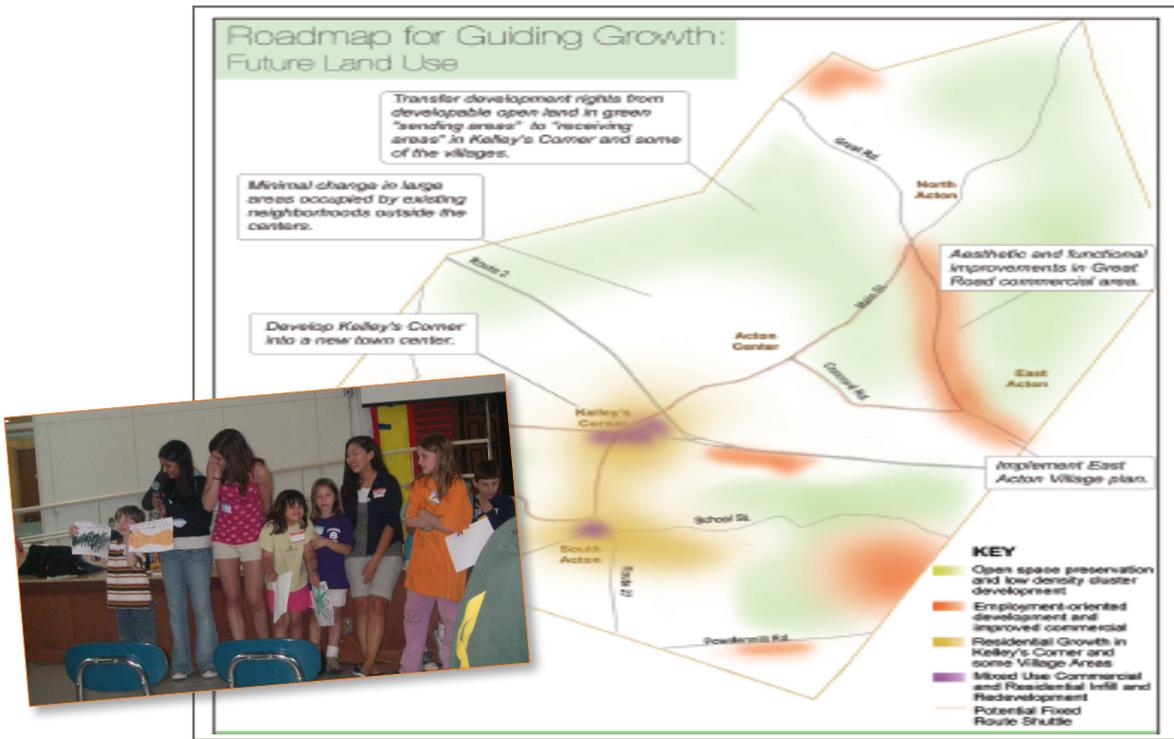
Milton's last master plan was completed in 1977; some of what makes the Town unique:

- Large historic mansions that are increasingly difficult to maintain, but which contribute greatly to the Town's character and sense of self
- Over 80% of the housing is single family, the majority of which is owner occupied
- Less than 1% of the land area in Milton is zoned for business
- Milton has 7,000 acres of open space and recreation
- Milton has a number of non-profit organizations that are significant land-owners
- The Town's recycling rate is almost 55%, the second highest in state.

Community Circle led the effort to complete a master plan in 2014 that was organized around seven goals and identified 20 key recommendations including:

- Through zoning, the creation of mixed use centers in order to add to the tax base, as well as to provide more in-town goods and services to residents
- Through urban design, the creation of a Civic Center where there is currently a collection of municipal uses (such as Town Hall, Library, Senior Center, etc.) but where there is no sense of place
- By a variety of means, the creation of affordable housing for seniors to downsize, young families to start their homes and for people who work in Milton to be able to afford to live there.

Outreach and public engagement included public meetings, roundtables, open houses, workshops, comment periods, a booth at a town festival, and social media activity.



Services
2009-2012

Public engagement

Results

Adopted & implemented

Plan Link



<http://www.acton2020.info/>

Community Visioning and Comprehensive Master Plan

Acton, Massachusetts

Acton is located 21 miles northwest of Boston. The town's population is 21,924 (2011 census). Actonians treasure their town. They feel strongly about preserving its character, which blends rural and historic characteristics, a small town feeling, and support for excellence in education.

Community Circle was co-lead in developing a two-phase master plan. Phase I was comprised of six months of intensive outreach to the Acton community through a variety of means. This extensive public input resulted in an "Emerging Vision Statement" and a set of goals and objectives that encapsulated what residents and business owners envisioned for the town's future. Phase II focused on conducting an inventory of existing conditions and identifying opportunities, challenges, local and regional trends. Finally, an implementation plan was developed that outlined the steps necessary to achieve the vision and meet the goals. With the help of one of the steering committee members, a very useful interactive online tool was developed that can be sorted and searched in any number of ways.

Outreach efforts engaged roughly 2,000 Acton residents. This degree of public outreach and participation was unprecedented in Acton. The following is a partial list of the opportunities that were provided to the public to participate in the community conversation:

- Committee meetings
- Roundtable discussions with town boards, committees and commissions
- Townwide public meetings and workshops
- Public comment board
- Leadership interviews
- Townwide phone, mail, and web survey to all Acton residents, businesses
- Project web page, blog, and Facebook page

Strategic Planning Projects

Various Locations

United States Department of Justice, Office of Justice Programs Strategic Planning Web Site

As a subcontractor to the National Criminal Justice Association, Jane Wiseman created a web site for the United States Department of Justice to teach state justice officials how to effectively prepare for and conduct strategic planning processes in their states. The site includes tools, techniques, and templates, including a frequently asked questions section. The site is designed to be user-friendly and provides tools and examples from peer states.

Resulting from this work, Jane later provided strategic planning for state justice officials as part of a project with the National Criminal Justice Association. This initiative provided the United States Department of Justice with a training curriculum for state justice officials on developing strategic plans. Having served as the state official responsible for preparing all strategic plans for federal funding, Jane was able to provide insight into what state officials need to know in order to be effective in developing strategic plans. Jane then created a two-day training program based on the curriculum and has delivered the training to state officials and community justice organization leaders. The training addresses how to develop community-based strategic plans, methods to gather data, and best practices information for use in strategic plan development. *(Reference on page 53)*

Executive Office of Public Safety Programs Division, Process Improvement Plan and Strategic Plans

As Assistant Secretary of Public Safety, Jane Wiseman developed a process improvement plan to address gaps in accountability and transparency at the grant-making Programs Division. A lack of documented standard operating procedures and internal controls had resulted in multiple simultaneous outside investigations into grant-making and accounting practices. A key part of the improvement plan process was to leverage technology for greater accountability and transparency. For the work achieved in this area, Jane was recognized by the Pioneer Institute in its Better Government Competition.

Also in this role, Jane completed the Commonwealth of Massachusetts Strategic Plan for Public Safety. She was responsible for preparing strategic plans for all federal grant programs, including the Justice Assistant Grant program, programs funded under the Juvenile Justice and Delinquency Act, Violence Against Women Act grant funds, the Residential Substance Abuse Treatment program, the Safe and Drug Free Schools program, the Homeland Security Grant Program, and all programs funded through the National Highway Transportation Safety Administration. Each of the strategic plans had unique reporting formats and timeframes. Each required data gathering and analysis and development of priority areas for funding. Federal grant funds were contingent on timely submittal of strategic plans. During her tenure, Jane received recognition from the National Highway Transportation Safety Administration for outstanding planning, and Massachusetts was the first state in the nation to complete a Homeland Security Strategic Plan. *(References on page 53)*

United States Department of Commerce Annual Performance Plan

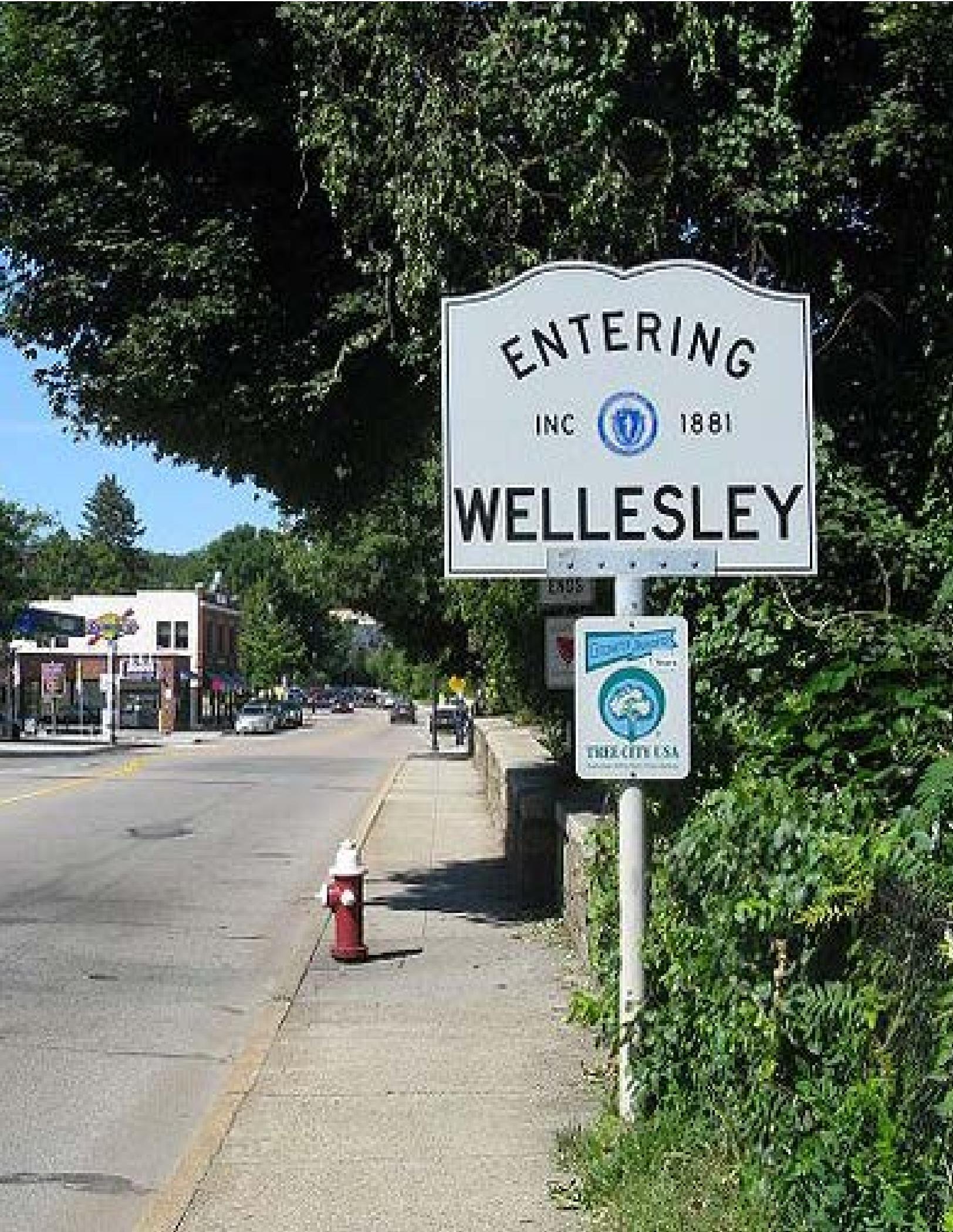
Jane Wiseman managed an Accenture team that helped the United States Department of Commerce create its first ever Annual Performance Plan (APP) for submission to Congress. The process for creating the APP entailed outreach to all stakeholders involved in creating performance measures at the agency level. Based on this work, the US Department of Commerce went from lowest-ranked to highest-ranked federal agency for performance management.

Commonwealth of Massachusetts eStrategy

Jane Wiseman provided project management support to the Accenture team that compiled a strategic plan for implementation of eGovernment technology projects across state government. Jane developed cost/benefit analysis so that projects could be compared and prioritized based on their estimated benefits to the Commonwealth.

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Required Forms



RFP FORMS

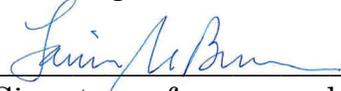
The two requested forms for certification of non-collusion as well as tax compliance follow.

In addition, we have reviewed the terms and conditions provided in the RFP and are confident that we can come to a mutually satisfactory agreement with you.

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.



July 20, 2016

Signature of person submitting contract/bid

Date

Stantec Planning and Landscape Architecture P.C.

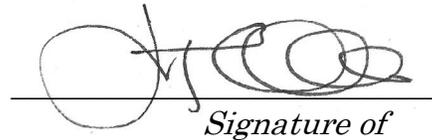
Name of Business

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.

20-8672158

*Social Security Number or
Individual or
Federal Identification Number*



Signature of

Corporate Name

Joseph T. Geller, FASLA

*Corporate Officer
(if applicable)*