

# Section 1.

## Applicant Information

### 1.1. Primary Location:

*Leverett*

<b>EOHED Region</b>	<i>Pioneer Valley</i>	<b>MassDOT District</b>	<i>District 2</i>	<b>Rural or Small Town</b>	<i>Both</i>
<b>MDFA Regional Office</b>	<i>West</i>	<b>Gateway City</b>	<i>N/A</i>	<b>Housing Choice</b>	<i>No</i>
<b>Regional Planning Agency</b>	<i>Franklin Regional Council of Governments</i>	<b>MVP Community</b>	<i>Yes - MVP</i>	<b>MBTA Community</b>	<i>No</i>

### 1.2. Organization Type

Public Entity

Municipality

Public Housing Authority

Redevelopment Authority or Similar Quasi-Governmental Agency

Water or Sewer District

Other Public Entity

please specify:

Non-Public Entity

### 1.3. Applicant Organization Name:

*Town of Leverett*

### 1.4. Applicant Organization Legal Address:

*9 Montague Road*

**1.5. City/Town:**

**1.6. State:**

**1.7. Zip Code:**

*Leverett*

*Massachusetts*

*01054*

**1.8. CEO Name:**

**1.9 CEO Title:**

*Thomas Hankinson*

*Chair, Selectboard*

**1.10. CEO Tel.:**

**1.11. CEO Email:**

*(413) 548-9699*

*townadministrator@leverett.ma.us*

### 1.12. Project Contact Name

*Marjorie McGinnis*

### 1.13. Project Contact Title

*Administrator*

**1.14. Contact Tel.:**

**1.15. Contact Email**

*(413) 548-9699*

*townadministrator@leverett.ma.us*

**1.17. Organization Description – Outline the organization’s mission, structure, and economic development goals and history.**

*The Town of Leverett has approximately 1,800 residents and is located in rural Franklin County. Bordering the Towns of Amherst, Sunderland, Montague, Wendell and Shutesbury, Leverett has a total of 35.55 miles of town roads and covers 23 square miles. Leverett operates its own Highway, Police and Fire departments, Library, Town Hall and Transfer Station. Leverett has its own Elementary School. Middle and high school students attend a regional school system based in Amherst.*

*The Town departments are overseen by a three member Selectboard. The Selectboard works with its Finance Committee to create a budget each year. The Elementary School is overseen by the School Committee.*

*The Town of Leverett wishes to utilize several avenues to enhance the natural and economic assets that it has while attracting new residents and businesses to town by making sure that the roads and commuting routes are in good condition, the health and safety of residents is protected, that the community is attractive and affordable to everyone, and that growth occurs in a measured and planned way. Leverett knows that its senior population is growing and is going through a study to ensure that the town offers relevant and helpful programs to its seniors.*

*Assets include two village centers: one with the town hall, church, post office, arts facility, easily accessible pond and some other historic structures; and the second with a small store, historic mills and structures, a nearby river and hiking areas. One major asset is the municipally owned fiber to the home system. A goal of the town and residents is to reduce the environmental footprint of the municipality and its residents for future generations.*

*Challenges for the Town are the lack of public infrastructure such as water and sewer and space constraints in village centers.*

## Section 2.

### Project Information

2.1. Project Categories for Grant Consideration (Check all that apply). Please note that, for each category selected, additional questions will appear in the application related to that funding type. (**note: Section 1.1 and 1.2 must be completed before selecting an option here**).

- Community Capacity Building
- Planning and Zoning
- Site Preparation
- Building
- Infrastructure

### 2.2. Project Name:

*Phase II of a Comprehensive Plan*

2.3. Is this a joint application between two or more municipalities (and/or entities), which will entail a formal arrangement for a shared scope of work and allocation of funds?

Yes

No

**2.4. Short Project Description / Abstract – Provide a concise description of the project, with a focus on the portion of the project for which the applicant is requesting funds.**

*This application is for the second of two phases in developing a Comprehensive Plan for Leverett. The first phase focused on assessing existing conditions and will be completed in June. For the second phase, a steering group and expert consultant will guide community engagement through visioning sessions and focus groups and synthesize outputs to present options to residents for consideration. It will culminate in the preparation of a Comprehensive Plan in conformance with MGL Ch 41, Sec.81D.*

**2.5. Leadership and Ability to Execute – Describe the leadership and project management group for this project and why it is an effective team to advance this project.**

*Creation of a Comprehensive Plan falls under the responsibility of the Planning Board, as required by Section 81D. The Leverett Planning Board has seven members, each elected to five-year terms. Planning Board members have a diverse range of direct experience overseeing town zoning and deliberating over plans proposed by community members and developers, designing amendments to zoning bylaws, and communicating and collaborating with civic leaders and community members. All members have a personal and professional commitment to local town government and development policy-making that is community-driven and evidence-based.*

*The Planning Board has successfully overseen Phase 1 of this project, including hiring a consultant who specializes in rural planning and development, conducting outreach to town residents, establishing the Phase 1 working group, and ensuring that work is on schedule for successful completion.*

*To replicate the success of the first phase of Comprehensive Planning, the Planning Board will once again work with an experienced planning consultant. The Planning Board will work with the consultant and the Leverett Select Board to establish a Comprehensive Plan steering group comprised of a cross-section of the community. The planning consultant will assist the steering group to organize and synthesize community visioning meetings and focus groups and present trade-offs and choices for community feedback. The Planning Board recognizes that the success of the plan hinges on the ability to fully engage the community and is dedicated to doing so.*

**2.6. Project Need – Describe why this project is necessary in enhancing economic development or unlocking other housing and/or jobs.**

*Leverett has never had a Comprehensive Plan. Its zoning bylaws reflect a time decades ago when the threat was over-development. We need to revise our zoning to reflect the current needs and constraints of our community. The Town's very high tax rate creates a social justice issue and discourages growth. A Comprehensive Plan will focus the community conversation on evidence-based development options and sustainable housing development to broaden our tax base and create shared prosperity. The immediate outcome will be a systematic revision of our zoning regulations to increase housing construction, invite commercial development, and reinforce our long-standing commitment to environmental protection. For the next several decades, the Comprehensive Plan and future revisions will reveal a sustainable and prosperous path and will serve as a common point of reference for decisions about zoning, municipal investments, environmental conservation, livability, and social equity.*

**2.7. Progress to date – What progress has the applicant made on this project to date? Include details about planning, stakeholder engagement, development tools used, noting if the project is included in any adopted municipal or regional plans (e.g. Master Plan, CEDS, HPP, etc.), etc.**

*Leverett began considering a Comprehensive Plan in 2019 when Town Meeting established a Revenue Committee to explore and recommend revenue opportunities. In the first year the Committee researched business opportunities suitable for Leverett's location and population and community-driven development preferences identified by a survey of over 300 residents. In the second year the Committee met with property and business developers and rural planning experts from the Franklin Regional Council of Governments, UMass Amherst, and other towns in Massachusetts. To better understand the tax rate growth trend, the Committee analyzed ten years of budget, tax, and assessment data. The output was a comprehensive report and the outcome was an invigorated community discussion of town sustainability and livability.*

*The report found that the complexity of development and municipal investment decision-making necessitated the guidance of a planner with rural land use and development expertise funded by a state grant. The ensuing discussion led by the Planning and Select Boards persuaded community stakeholders to support a Comprehensive Plan. Leverett's collaborative community and town government now embraces planning that can synthesize a community vision and long-term implementation of zoning revision, housing, commercial, and recreational development, water and sewer infrastructure planning, livability and inclusivity policy, historic preservation, natural and cultural resource conservation, climate adaptation and sustainability, regional cooperation, and mutually beneficial regionalization of town services.*

*The first phase, the assessment of existing conditions by a planning consultant and a working group, is on track for completion by June 2022. First phase tasks have included RFP distribution, selection of a consultant, collection of existing conditions data, and recruitment of a working group of residents to evaluate and discuss the data in support of the consultant's report.*

**2.8. Prior State/Federal Funding - Has the applicant applied for or received state or federal funding for this project? Please detail any type of funding, including grants, financing, etc. from any state agency or quasi-public agency (i.e. MassDevelopment).**

*This application is for the second phase of a two-phase project to create a Comprehensive Plan. The first phase was funded by a \$39,000 grant awarded under the Community One Stop for Growth Community Planning grant program. The first phase is on schedule to be successfully completed by June 30, 2022.*

*This grant application is one of many that have been received and administrated by the Town of Leverett. Over the past several years, the Town has received annual Emergency Management Planning Grants (EMPG), biannual Community Compact grants, has undergone a multi-year program to complete a Municipal Vulnerability Preparedness (MVP) Plan and currently has been awarded a \$258,750 MVP Action grant to repair one of the issues identified in that planning process. Leverett also is a certified Green Community and has completed many projects under that grant program and is currently working on a Community Compact Regionalization grant to provide police services to a neighboring community.*

**2.9. Timeline – Provide the start/end dates for the overall project and any other notable periods. Note: Grants will be announced in fall 2022 for contracts starting in FY23. Dates below should reflect that timing.**

<b>Target Start Date of the Project:</b>	10/1/2022
<b>Target End Date of the Project:</b>	10/31/2023
<b>Other. Specify:</b>	
<i>RFP Issued</i>	10/30/2022
<b>Other. Specify:</b>	
<i>Consultant Selected</i>	12/31/2022

**2.10. Timeline Information – Describe the timeline for the project and provide information about any notable dates and/or milestones.**

*Task 1: Project Initiation January 2023*

*Task 2: Updated Community Outreach and Engagement Strategy January 2023*

*Task 3: Complete Documentation of Existing Conditions January – February 2023*

*Task 4: Community Discussions March – June 2023*

*Task 5: Draft Comprehensive Plan and Presentations June – September 2023*

*Task 6: Community Approval Process and Final Comprehensive Plan September – October 2023*

**Timeline Information**

*The timeline above indicates the anticipated amount of time necessary for each task. The Phase 1 report suggests a need for significant community engagement as part of this planning process; four months is suggested for community discussions of conditions, options, alternative scenarios, and priorities. The plan can be completed during the summer months with approval by the Planning Board expected in fall 2023. Please see the scope attached for additional information about meetings and deliverables.*

**2.11. Anticipated Outcomes - Provide a description of the anticipated outcomes of the project. Describe the envisioned end use and expected impacts, such as information about housing, jobs, residents or businesses supported.**

*Leverett needs a Comprehensive Plan to support thoughtful development. Our zoning is decades old and has never had a thorough review and revision. Our zoning is restrictive and requires large lots. We have a tiny amount of commercially zoned land. Creation of a Comprehensive Plan will focus the community conversation on additional housing and creative economic development options to benefit our community.*

*We expect the following outcomes from a Comprehensive Plan implementation:*

*? Newhousing production through better zoning that encourages housing development while protecting the environment and preserving the town's rural character*

*? Increased commercial development*

*? Better protection of critical habitat and other environmentally sensitive zones by incorporating well-informed environmental constraints into zoning and municipal investment decisions*

*? Advancing social equity by making newhousing less expensive with more thoughtful zoning and a lower tax rate*

*? A more economically sustainable community by increasing newdevelopment to reduce the extremely high tax rate*

*? Better utilization of community historic and open space resources*

*? Discouraging development in areas that are subject to flooding*

*? More concentrated development with less environmental impact through revisions of zoning*

*? More housing units by better use of accessory dwelling regulations*

*? Better utilization of past municipal investments such as roads and our municipal fiber optic network by allowing more concentrated development*

2.12. Does the project support and/or directly result in any of the following Sustainable Development Principals? (Check all that apply or None)

Concentrate Development and Mix Uses

Advance Equity

Make Efficient Decisions

Protect Land and Ecosystems

Use Natural Resources Wisely

Provide Transportation

Increase Job and Business Opportunities

Promote Clean Energy

None

2.13. Does the project support and/or directly result in any of the following development outcomes? (Check all that apply or None)

Transit-Oriented Development (located within a half mile of a transit station or route)

Developments that Contain a Mix of Residential and Commercial Uses

Production or Preservation of Housing (with density of at least four units to the acre)

Developments that are Reusing Previously Developed Sites

Development of Underutilized Properties

Development of Commercial Areas in a Downtown

Development in a Transformative Development Initiative (TDI) District

Development in an Opportunity Zone

Development in a Cultural District

Development in a 43D Expedited Permitting District

Promote Equitable Opportunity (Equitable Opportunity is a principle outlined in the state's economic development plan – *Partnerships for Growth*. Click [HERE](#).)

Have Environmental Benefits

Develop or support Small Businesses

Included in the community's Local Rapid Recovery Plan (LRRP)

None

2.14. Is this project directly related to and/or seeking to support efforts related to economic recovery from the Covid-19 pandemic?

Yes

No

2.15. Does the community have an active housing moratorium or any type of restriction of new housing?

Yes

No

2.16. Is the project site located within an Environmental Justice census block group? Click [HERE](#) to access the Commonwealth's Environmental Justice Map Viewer.

Yes

No

2.17. Does the applicant have a letter from the municipal CEO outlining knowledge of and support for the proposed project? If yes, attach support letter.

Yes

No

**ATTACHMENT HERE: *Attach the support letter from the municipal CEO.***

*selectboard support masterplan 2022.pdf*

# Section 4.

## Planning and Zoning Additional Questions

4.1. Before you proceed, have you read the Guidelines for [Community Planning, Massachusetts Downtown Initiative](#) and /or [Real Estate Services](#)?

Yes  No

By virtue of your community's status as a Rural or Small, this project is eligible for the [Rural and Small Town Development Fund](#).

4.1.a. Have you read the guidelines for the [Rural and Small Town Development Fund](#)?

Yes  No

4.2. What type of development plan or study are you seeking to fund? (*Check One*)

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Master Plan</li> <li><input type="checkbox"/> Land Use Plan</li> <li><input type="checkbox"/> Urban Renewal Plan</li> <li><input type="checkbox"/> Housing Production Plan</li> <li><input type="checkbox"/> Downtown Plan</li> <li><input type="checkbox"/> Parking Management Plan</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Market Feasibility Study</li> <li><input type="checkbox"/> Zoning Review and Updates</li> <li><input type="checkbox"/> Zoning to comply with the MBTA Communities section of c40A section 3A</li> <li><input type="checkbox"/> District Improvement Financing (DIF) Plan</li> <li><input type="checkbox"/> Municipal Surplus Property Disposition Plan</li> <li><input type="checkbox"/> Other</li> </ul> |
|--|---|

4.3 Narrative / Scope of Work - Describe the proposed work that will be funded by the grant and carried out to further this project. Include the major tasks, timing of consultants procurement and overall timeline for the project. If applicable, describe the specific geographic area.

*The town of Leverett has never created a Comprehensive Plan. Its zoning bylaws are outdated, reflecting conditions studied fifty years ago when the problem defined by the community was rapid overdevelopment driven by the growth of UMass Amherst. Today, the town needs to address its residential property tax rate, ranked 40th highest out of 351 municipalities in Massachusetts, while sustaining quality of town assets and liability obligations.*

*Lack of development has adversely impacted the town’s social and economic resiliency. The town’s commercial development is proportionally small, and lack of water and sewer infrastructure is an obstacle to commercial growth. Limited commercial or industrial sectors and the historical commitment to high level of investment in education have created problems of affordability and accessibility for some residents and people who would like to but cannot afford to live in Leverett.*

*The town’s need for development raises the question of environmental resiliency. Leverett’s hills magnify flooding erosion from stormwater events and these floods are becoming an increasing problem for residences and roads. Much of the land in Leverett is forested and requires maintenance by foresters and forest ecologists to sustain critical habitats, prevent and mitigate fires, and adapt to impacts of a changing climate.*

*Expert planning is required to reduce tax burden, improve services and amenities, and revise zoning to invite strategic residential, commercial, and infrastructure development. Expert planning is required to maintain the town’s long-standing commitment to preservation of rural character and natural resource conservation alongside the changes of economic development. Leverett will once again contract with an experienced planner and land use expert to lead the community conversation on how strategic planning for all the Comprehensive Plan elements required by Section 81D would constructively impact the town socially, economically, and environmentally.*

*A Comprehensive Plan would facilitate a discussion about how we could encourage development in areas less prone to catastrophic flooding.*

*A Comprehensive Plan would focus zoning, policy, and municipal investment while considering both long-term economic sustainability and fair distribution of equity and access owed to both today’s residents and tomorrow’s newcomers.*

*A Comprehensive Plan would provide a common framework for deliberation and decision-making about the social and economic equity issues of our current zoning and policies. These impacts would relieve the burden on low- and fixed-income people who wish to remain or become members of the Leverett community.*

*A Comprehensive Plan would provide guidance on how development and land use change can support social equity and economic needs without compromising beauty and recreational value, critical habitats, and ecosystem resilience of the land.*

*Leverett has a track record of making significant investments in its elementary school, municipally owned fiber optic broadband, conservation and rich natural resources, open space and recreation, and partnership with neighboring towns and regional initiatives that have strategically helped the town attract people seeking to live in a friendly community and beautiful environment in Franklin County that is conveniently located near Amherst, Greenfield, Springfield, state and interstate highways, and the job opportunities of Western Massachusetts, particularly in the local colleges and universities.*

*The town’s commitment to a community-driven and evidence-based Comprehensive Plan is Leverett’s next big strategic investment, reducing tax burden, improving services, optimizing social equity, and preserving qualities cherished by the community.*

*A detailed Scope of Services with a projected timeline and tasks to be completed is attached.*

**Attach a map or conceptual drawing showing the location of the planned district and/or project area.**

*street map.pdf*

4.4 Budget – In the table below, provide a breakdown, by spending category, of the total budget for the proposed project. Enter the grant amount(s) requested/allocated for each category and the amount(s) covered with matching funds, if any. Matching funds are not required but applications showing over 10% local CASH match will receive special consideration.

Spending Category	Funds Requested	Match / Other Funds	Total Project Budget	Source of Match / Other Funds
Consultants / Prof. Fees	\$67500	\$0	\$67500	

Meeting Express / Events	\$2500	\$4000	\$6500	<i>town operating funds/grants</i>
Project Supplies / Materials	\$5000	\$4000	\$9000	<i>town operating funds/grants</i>
Other / Miscellaneous	\$0	\$0	\$0	
<b>Total</b>	<b>\$75000</b>	<b>\$</b>	<b>\$</b>	

**4.5 Briefly, provide line item explanations, justifications, and/or notes, as needed. Include description of the sources(s) and status of all matching funding.**

*The funds requested are for a consultant who will undertake the tasks shown in the proposed scope of work described above. The consultant's fee includes meetings, travel, and materials; however, an estimate of those expenses has been broken out to meet the budget format in the application.*

*Matching funds would be used for transportation for site walks, rental of space, tables, etc. for public meetings, printing flyers, advertisements in local papers, postage for town-wide mailings, and food for public meetings.*

**4.6 If known, provide the contact information for the provider undertaking the project.**

<b>Entity/Company:</b>	<b>Phone:</b>
<b>Contact Name/Title:</b>	<b>Email:</b>

**Attach a cost estimate or proposal from prospective consultant(s) or professional services provider(s) for this project.**

*Consultant Scope planning 2022.pdf*

**4.7 Public Engagement Plan - Describe the community engagement process for the project. Address the following: How are you adding voices to the public engagement process through remote only, hybrid, or in-person engagement?**

*In the first phase the Planning Board created engagement plans to promote public support and awareness. This included personal and neighborly outreach, and communications on local online forums, in the monthly town newsletter, in local newspapers, at public forums including Town Meeting, Select Board meetings, and other committee meetings.*

*In the second phase, the Planning Board will continue these engagements and explore curation of personal essays written by residents on planning, development, and community priorities, in-person and online discussions, and outreach at events hosted by special interest groups.*

*Planning consultant engagement will include community visioning discussion and focus groups, cultivation of participants as Comprehensive Plan ambassadors to leverage peer effects, and a Comprehensive Plan review process that will give community members the opportunity to read and comment on drafts submitted by the consultant to the Planning Board.*

**4.8. Community Leadership - If existing, describe the group of individuals that will work on this project and what makes it innovative, if not yet formed, describe the plan for the group's composition and work. Address how the project will be sustained over time if applicable.**

*Leverett's Planning Board, which is responsible for the Comprehensive Plan, has seven members, each elected to five-year terms. The experience on the Planning Board includes zoning and development, infrastructure planning and implementation, real estate law, design-build, historic preservation, university lab facilities management, community-based participatory research, strategic communications, and group facilitation for racial justice and bridging community divides. This group has deliberated carefully and at length about how to conduct Comprehensive Planning that will best meet the needs, leverage the assets, and preserve Leverett's historical, environmental and cultural resources. All members recognize that the long-term success of this Comprehensive Plan depends on full engagement of the community and careful collection and documentation of local conditions data. The resulting innovation is a commitment to community-driven and evidence-based planning throughout the whole project.*

**4.9 Implementation and Outcomes - Describe the enactment, adoption, and/or implementation process for the plan(s) completed by this project. Identify any necessary review and/or approval entities such as Planning Board, Council or Selectboard and/or subcommittee Committee, town meeting, etc.**

*Comprehensive Plan drafts written by the consultant will undergo review and comment by the Planning Board and the community. The Planning Board will approve the final draft and submit it for endorsement by Town Meeting vote. Any zoning changes that result from the Comprehensive Plan project will be separately presented to Town Meeting.*

*In addition to zoning changes that it is hoped will increase housing construction, invite commercial development, and reinforce our long-standing commitment to environmental protection, the Comprehensive Plan and future revisions will reveal a sustainable and prosperous path and will serve as a common point of reference for decisions about municipal investments, environmental conservation, livability, and social equity.*

4.10. Does the project involve more than one (1) community allowing for shared services and peer to peer learning opportunities?

Yes  No

4.11. Does the project directly relate to the design, enhancement or provision of water and sanitary sewer infrastructure?

Yes  No

4.12. Does the project support economic development specific to rural communities and small towns?

Yes  No

**4.12.a. If YES, briefly describe how**

*A central focus of the Comprehensive Plan project is development of a sustainable economic base for our rural community. Our current zoning is antiquated and has not had a thorough review and revision. Our zoning is restrictive and requires large lots. We have a tiny amount of commercially zoned land. For this project the community will collectively examine various options for sustainable economic development including identification of creative opportunities for new housing and appropriate commercial development. The Plan will also lead to better utilization of historic and cultural resources and coordination of municipal investments. Leverett is a small town that has always treasured rural character, industriousness, preservation of historic and cultural resources, natural resource conservation, and excellent school system. This project will help us utilize those assets to adapt the town economy in a way that creates a sustainable and equitable way forward for all constituents.*

## Section 9.

### Certification of Application Submission Authority

9.1 If the applicant is a public entity, does the submission of this application require a formal vote of any board, commission, or other local entity? If Yes, attachment required.

Yes

No

Not Applicable

9.2 If the applicant is a non-public entity, does the submission of this application require the authorization of the entity's board of directors, or other governing body or bylaw? If Yes, attachment required.

Yes

No

Not Applicable

: If yes, attach a document demonstrating such authorization.

I, *Marjorie McGinnis* (Submitter Name), hereby certify that I am duly authorized to submit *Town of Leverett* this application on behalf of

(Applicant Organization Name). By entering my name in the space below, I further certify, under the pains and penalties of perjury, that the responses to the questions provided in this application, and the attached documentation, are true, accurate, and complete. I understand that the Executive Office of Housing and Economic Development (EOHED) and its partner organizations, specifically the Department of Housing and Community Development (DHCD) and the Massachusetts Development Finance Agency (MDFA), will rely on the information provided in this application to make decisions about whether to award a grant from their respective funding sources. Also, that the Commonwealth reserves the right to take action against me, the applicant organization, and/or any other beneficiary of a grant, if any of the information provided is determined to be false, inaccurate, or misleading. I also affirm that, if awarded, the applicant organization has the capacity to carry out the project in accordance with all applicable laws and regulations.

*Marjorie McGinnis*

*Executive Administrator* **Title**

*5/31/2022 3:23:49 PM*

## Section 10.

### Other/Optional Attachments

In this section, upload all attachments that support this application.

Applicants may submit other attachments to support the application, which may be reviewed and/or filed. However, please note that these items will generally not be scored or assessed as part of the formal evaluation of the proposal.

Attachment Type	Description
Other Site Images	<b>Other site photographs, illustrations, and/or maps.</b> <i>zoning map of Leverett.pdf</i>
Other Partner Letters	<b>Letters from any partner organizations that are collaborating on this project.</b> <i>planning board support may 2022.pdf</i>
Other Support Letters	<b>General support letters.</b> <i>comerford and blais support letters planning 2022.pdf</i>