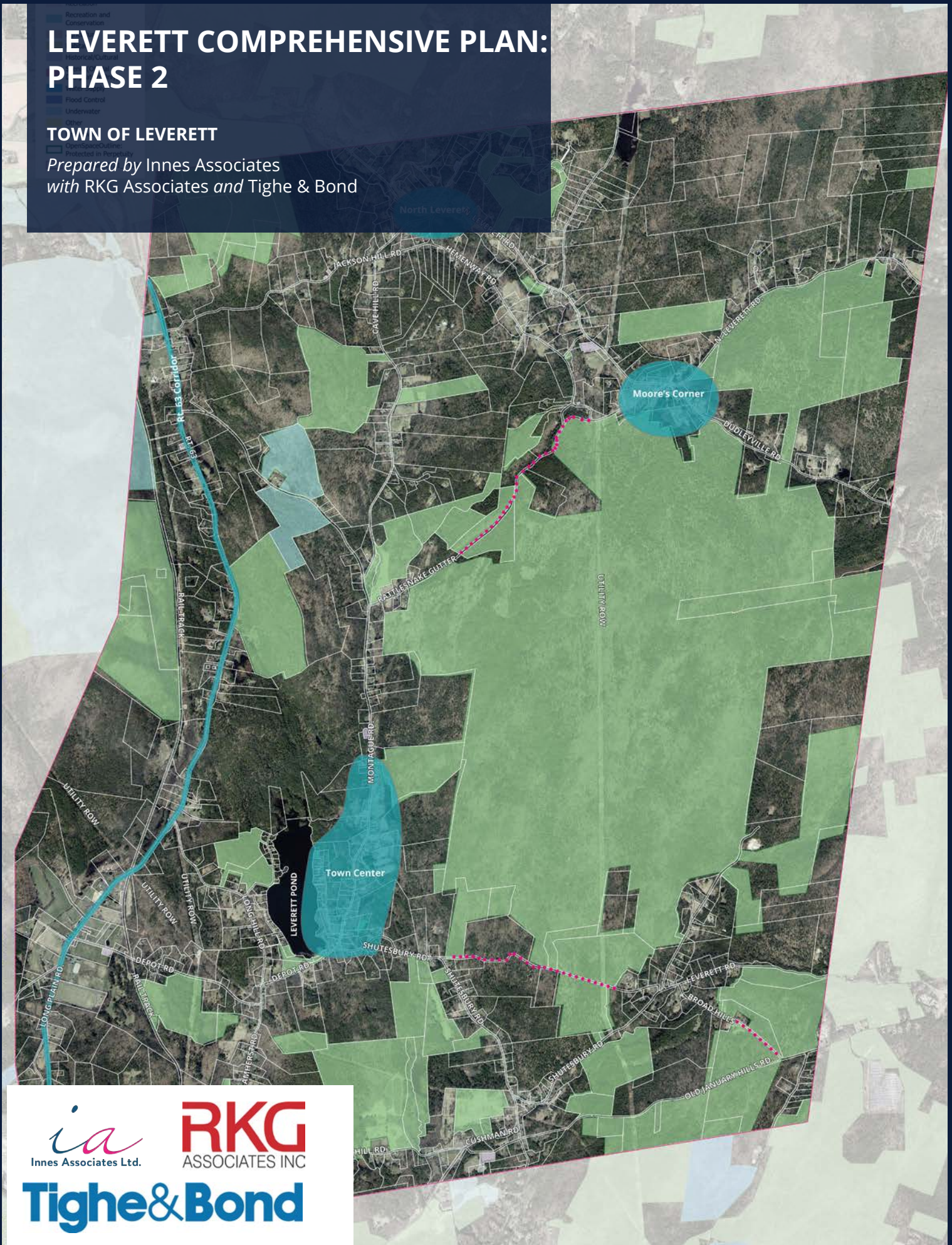


LEVERETT COMPREHENSIVE PLAN: PHASE 2

TOWN OF LEVERETT

Prepared by Innes Associates
with RKG Associates and Tighe & Bond





January 9, 2023

Town of Leverett
Attn: Marjorie McGinnis, Town Administrator
PO Box 300
Leverett, MA 01054

Re: RFP for the second of two phases of the development of a Comprehensive Plan

Dear Ms. McGinnis and Members of the Selection Committee:

I enjoyed working with the Town of Leverett last spring on Phase 1 of the process to develop the Town's Comprehensive Plan. It is my pleasure to submit a proposal for the second stage of this planning process.

I have asked two colleagues to join my team whose expertise will help address specific topics raised during this first part of the planning process: **Eric Halvorsen, AICP of RKG Associates**, and **Tracy Adamski, AICP, of Tighe & Bond**. I have worked with Tracy on the South Hadley comprehensive plan, and we are working with the Town of Egremont now. Eric also contributed to the South Hadley Comprehensive Plan and he and I are collaborating with several communities on housing, economic development, and zoning projects. This proposal contains more information about Eric and Tracy and their firms. If our team is chosen, I will remain the Project Manager and your direct contract during this planning process.

During Phase 1, it became apparent that the Leverett Community has a history of engagement in smaller groups, including collecting the oral histories of residents. One of the things we discussed was how to continue that tradition of in-depth conversations and sharing information and ideas. An example of this is the Historical Commission's current Embodied History program. As a result, this proposal offers a less traditional approach, but one that I believe will be more meaningful to the community.

We hope the information in this proposal is helpful as you evaluate the responses you receive. Please let me know if you have any questions. I am excited by the possibility of working with you again and, if chosen as your preferred consultant team, I look forward to introducing my colleagues to the Leverett community.

Best regards.

Emily Keys Innes, AICP, LEED AP ND
President
emily@innes-design.com



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and Project Pages9**

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PROJECT TEAM

The Innes Associates team is uniquely qualified to assist the Town of Leverett with the second phase of their comprehensive planning process. In addition to my work with the Leverett community in Spring 2022, I have the following master plan/comprehensive planning experience.

- I led the process for the South Hadley 2020 Master Plan Update, the award-winning Scituate 2040 Master Plan Update, and the state-approved West Warwick (RI) 2020 Comprehensive Plan Update.
- I am leading the Town of Egremont Comprehensive Master Plan Update and co-leading the Town of Groveland Master Plan Update. Egremont had a population of 1,372 in the 2020 census. Groveland is larger with a 2020 population of 6,871. Both, like Leverett, have significant natural resources that contribute to the quality-of-life in those towns but also limits opportunities for development.
- I am assisting the Towns of Burlington and Newbury with the completion of their master plans. Like Egremont, Newbury is a right-to-farm community and has significant natural resources and protected land.
- I am a subconsultant on the City of Medford Comprehensive Plan, with a focus on land use and zoning issues.

I expect these ongoing plans to be completed by June 30, 2023, if not earlier, which works well with the timing of the Phase 2 process.

Finally, I have over twelve years of planning and urban design experience, including writing zoning that has been adopted by communities in Massachusetts and Connecticut. This includes village district zoning in Connecticut and a downtown hybrid form-based code and coastal village zoning district in Massachusetts. I am working on a form-based code for another downtown and housing-related zoning projects in several communities as part for technical services for the Massachusetts Housing Partnership (MHP).

Eric Halvorsen and his team at RKG Associates is a frequent partner on projects that involve the intersection of market and zoning analyses. RKG Associates and Innes Associates are collaborating on the technical services for MHP and an evaluation of zoning for housing in Littleton. We have also worked together on industrial zoning for the Town of Arlington, many redevelopment projects, and the South Hadley Master Plan Update. RKG Associates has a strong background in housing and economic development and will help to address the questions about municipal costs and impacts from development from Phase 1.

RKG Associates is also familiar with planning for small and rural communities. In addition to their extensive work on housing, they have also recently completed economic development

plans for the Town Charlemont and the North Central Massachusetts Region. Please see their project sheets for more information about their work for rural communities.

Tracy Adamski from Tighe & Bond is another team member on the South Hadley Master Plan; Tracy led the process of updating the Open Space and Recreation Plan while I led the master plan process. We are replicating that effort in the Town of Egremont, which has many similarities with the Town of Leverett. Tighe & Bond also has expertise with solid waste management systems; Tracy and her colleagues are a natural fit to help address some of the questions about sewer that arose during the Phase 1 process.

Tracy will draw on Tighe & Bond's resources, her colleagues with relevant expertise, to assist with the questions raised during Phase 1.

Part of our work, as you will see in the attached response to your scope of services, will be to address the missing information identified in Phase 1. This will complete the four recommended items on page 11 of the Phase 1 report: asset-mapping, building a common dataset, developing appropriate build-out scenarios, and conducting a fiscal impact analysis of new development, including assisting with questions about solid waste management. We will also address the recommendations and questions on pages 15 and 16 of the Phase 1 report and coordinate our work with other planning processes

Together we hope to work with the Steering Committee, Town officials, and Town staff to create the different scenarios to evaluate future land uses and development patterns in the town. These scenarios, as noted in the RFP, will help guide conversations about choices and trade-offs. This is a process I used with my team in Scituate to evaluate community preferences for growth, status quo, or restricting growth in the face of needed public investments to address aging facilities and the impact of sea level rise. This planning technique is also appropriate for the conversations we began last spring, and should lead to recommendations for policy changes, zoning revisions, priorities for public investment, and an implementation plan that includes roles, responsibilities, metrics or benchmarks for measuring progress, and a process for evaluation of progress and updates to the plan.

RESPONSE TO SCOPE OF SERVICES AND TIMELINE

Our team agrees with the components of the proposed scope of work in the RFP. The timeline below seeks to place the indicated meetings and deliverables into the draft timeline. If our team is chosen as the preferred consultant, we would anticipate finalizing the work plan at the first meeting, as shown in the timeline below, and incorporating that scope of work into the contract.

The process for the Community Visioning Groups establishes common expectations for the groups. We anticipate that team members will be involved in this process in four ways:

- Providing materials to support the groups meetings that include the scenarios and supporting existing conditions.
- Training Steering Committee members as facilitators to conduct some of the meetings.
- Being present at the first meeting of each group to help set the stage for the process.
- Analyzing the input collected by facilitators and documenting that input for inclusion in the draft plan and subsequent presentations.

One possibility might be to establish the groups based on specific topics identified in the planning process and tied to the master plan elements from Section 81D. Such organization would allow in-depth discussion of the scenario plans from a specific focus point for each group while allowing the conversation to also consider the high-level topics from other groups. For example, one group might focus on housing needs in more detail, while recognizing the work of other groups on recreation and economic development, two topics with close relationships to housing.

Given the Historical Commission's experience with small group facilitation and oral history gathering, we would value their input into developing the visioning process and the training materials for interested Steering Committee members.

Draft List of Meetings and Deliverables

Task	Meetings	Deliverables	Timeline
1	Project kick-off and site walk.	Updated work plan with timeline. Assistance with recruitment process for Steering Group.	February 2023
2	Orientation meeting for Steering Group.	Updated Outreach and Engagement Strategy.	April 2023
3		Completed evaluation of existing conditions. Slide deck of existing conditions.	April 2023
4	Steering Committee (up to 3 meetings). Town officials and staff (up to 5 meetings). Community Visioning Groups (10-15, but not all will require consultant presence). Community event if timing is appropriate.	Draft and final scenarios for discussion. Materials for Community Visioning Groups. Facilitation instructions and training for volunteer facilitators. Community-wide surveys (2).	August 2023
5	Steering Committee (up to 2 meetings). Town officials and staff (one meeting).	Draft plan, zoning recommendations, and septic regulation changes. Second draft. Appendix of public comments during review process.	September 2023
6	Steering Committee (one meeting). Planning Board (one meeting). Community meeting (one meeting).	Slide deck for presentation to Planning Board. Final plan.	October 2023

Project to be completed by end of November 2023.

FIRM PROFILES, RESUMES, AND PROJECT PAGES

The following pages include firm profiles for Innes Associates, RKG Associates, and Tighe & Bond; resumes for team members from each firm; and project pages for each firm showing relevant experience.

The project pages provide a selection of representative projects for each firm. These references are associated with the project pages in this section.

INNES ASSOCIATES

Egremont Comprehensive Plan

Jared Kelly, Planning Board Chair
Town of Egremont
jaredtkelly@gmail.com

Groveland Comprehensive Plan

Rebecca Oldham, Town Administrator
Town of Groveland
(978) 556-7204
ROldham@grovelandma.com

Scituate Master Plan Update

Karen Joseph, Town Planner
Town of Scituate
(781) 545-8837
kjoseph@scituatema.gov

South Hadley Master Plan Update

Anne Capra, AICP, Director, Planning & Conservation
Town of South Hadley
(413) 538-5017 x6128
acapra@southhadleyma.gov

RKG ASSOCIATES

Charlemont EDSP

Sarah Reynolds
Town Administrator
Town of Charlemont
(413) 339-4335 X 8
administrator@townofcharlemont.org

Littleton Master Plan

Maren A. Toohill, AICP, Town Planner
Town of Littleton
(978) 540-2425
MToohill@littletonma.org

North Central Mass EDSP

Roy M. Nascimento, CCE, IOM
President & CEO
North Central Massachusetts Chamber of Commerce
North Central Massachusetts Development Corporation
(978) 353.7600 ext. 225
rnascimento@northcentralmass.com

TIGHE & BOND

Brewster

Peter Lombardi, Brewster Town Administrator
plombardi@brewster-ma.gov
(508) 896.3701

South Hadley

Anne Capra, Director, Planning and Conservation
(see above)

Thomaston

Jeremy Leifert, City Planner
Torrington, CT
Jeremy_Liefert@torringtonct.org
(860) 489.2221



Innes Associates Ltd.

tools for success

Emily Keys Innes, AICP, LEED AP ND founded Innes Associates to continue her work with New England communities of all sizes, assisting with planning at all scales: from lots to neighborhoods to entire towns or cities. Our focus is on **providing municipalities with the tools they need to support their communities** through changes in their economy, society, and environment (built and unbuilt).

places for people

Our expertise in high-regulatory environments helps communities begin the process of revitalizing their downtowns, waterfronts, and industrial areas. We understand how zoning and other regulations control the physical environment, and how that control can **increase the quality of life for people and improve the economic context for businesses, while still providing flexibility for development.**

As part of our commitment to better housing for all, we collaborated with the Massachusetts Housing Partnership, DHCD, and our colleagues at RKG Associates on the MBTA Communities Compliance Model.

Innes Associates is certified as a Woman-Owned Business Enterprise (WBE) with the Massachusetts Supplier Diversity Office.

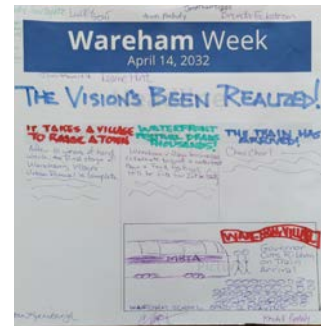
revitalization

We work with people to make their places better – more activities, more housing choices, more jobs, and a higher quality of life. We are proud that in Massachusetts, we have collaborated with two critical programs: MassDevelopment’s technical services program and the Massachusetts Downtown Initiative, part of the Department of Housing and Community Development. We have deep experience with the regulatory structures and other tools and actions required to make revitalization happen in our communities.

Those tools include land use plans, zoning changes, design guidelines, and, in Massachusetts, state-enabled programs such as urban renewal/redevelopment plans, 40R, HDIP, and UCH-TIF.

resiliency

Resiliency is a term that can be both overused and misunderstood. However, understanding how our communities can address chronic stressors and acute shocks is critical to their long-term social, economic, and environmental health. We have worked with communities to develop tools to address the impacts of climate change in both cities and more rural communities, including one of the first municipal studies on how climate change might impact our agricultural communities. Our work in downtowns of all scales helps build economic and social strength, and **we understand the strong relationships among affordable housing, well-paying jobs, and engaging places to live, work, play, and learn.**





Emily Keys Innes, AICP, LEED AP ND

Emily Innes is an award-winning planner with over twelve years of experience in planning and urban design. During those twelve years, Emily has been either project manager or project director for over eighty projects. She started with The Cecil Group in 2010 and moved to Harriman Associates in 2015 when The Cecil Group became part of Harriman. Emily became Harriman's Director of Planning in 2019, and led their Urban Design and Planning Studio. In 2020, Emily founded Innes Associates to continue her work with communities throughout New England. Her clients are communities of all sizes, state agencies, and private developers, and her primary focus is understanding and guiding the physical use of land and the impact of regulations on communities.

Selected Awards

APA-MA Comprehensive Plan: 2021
Scituate 2040 Master Plan Update

APA-MA Planning Project: 2020
Easthampton Downtown Strategic Plan.

APA-MA Neighborhood Plan: 2019
CSX Area Master Plan

APA-MA President's Award: 2017
Lawrence TBD Urban Renewal Plan

Salem Historic Inc: 2011
Salem Downtown Renewal Plan

Certifications

American Planning Association:
Certified Planner (AICP)

USGBC:
LEED AP Neighborhood Development

Commonwealth of Massachusetts:
MVP-Technical Services Provider

Education

MIT Professional Certificate in Real Estate Finance and Development
University of North Carolina at Chapel Hill: Bachelor of Arts, Linguistics

Professional Affiliations

American Planning Association
Urban Land Institute

Academic Positions

CPUA, Metropolitan College, Boston University: Adjunct Faculty

Relevant Project Experience

*Experience with The Cecil Group/Harriman Associates.

** As Harriman Associates and Innes Associates.

COMPREHENSIVE PLANS

Town of Leverett, Massachusetts

Comprehensive Master Plan: Phase I Process

Town of Burlington, Massachusetts

Completion of Comprehensive Master Plan

Town of Egremont, Massachusetts

Comprehensive Master Plan

Town of Groveland, Massachusetts

Comprehensive Master Plan

Agency Landscape + Planning/City of Medford, Massachusetts

Comprehensive Master Plan

Agency Landscape + Planning/City of New Bedford, Massachusetts

Comprehensive Master Plan

Town of Newbury, Massachusetts

Completion of Comprehensive Master Plan

Town of Scituate, Massachusetts**

Comprehensive Master Plan Update

Town of South Hadley, Massachusetts**

Comprehensive Master Plan Update

Town of West Warwick, Rhode Island*

Comprehensive Master Plan Update





RECENT PRESENTATIONS

**Gateway Cities Housing Institute,
Day 2: Create Opportunity with
Local Assets**, November 4, 2021

Downtown After COVID, April 7, 2021

#BUcity Keynote Lecture, October
28, 2020

URBAN DESIGN AND REGULATORY

Town of Arlington, Massachusetts*
Residential Design Guidelines

Town of Arlington, Massachusetts**
Industrial Area Zoning Recommendations

City of Brockton, Massachusetts
Downtown/Trout Brook Form-Based Code

Connecticut Trust for Historic Preservation/City of Ansonia, Connecticut*
Village District Zoning and Design Guidelines

Connecticut Trust for Historic Preservation/Town of Westport, Connecticut*
Village District Study

Town of Littleton, Massachusetts
MBTA Communities Zoning Evaluation

Massachusetts Housing Partnership/RKG Associates
MBTA Communities Compliance Model

Massachusetts Housing Partnership/RKG Associates
Technical Assistance for MBTA Communities

Town of North Andover, Massachusetts
Downtown Zoning Study

City of Pittsfield, Massachusetts
Zoning Evaluation and Arts District Design Guidelines

City of Pittsfield, Massachusetts*
Downtown Hybrid Form-based Code

OTHER RELEVANT PLANS

DHCD: MDI/Town of Sterling, Massachusetts**
Town center design guidelines


DHCD: MDI/Town of Spencer, Massachusetts*
Town center design guidelines

DHCD: MDI/Town of West Newbury, Massachusetts*
Evaluation of Sewage Disposal Center as a Strategy for Economic Development

City of Claremont, New Hampshire*
Design and Zoning Charrette

Town of Shutesbury, Massachusetts*
Community Vision Plan

Town of Harvard, Massachusetts*
Municipal Vulnerability Program (MVP) Planning Services/ Agriculture and Climate Change





Egremont's Selectboard, Planning Board, and Conservation Commission announce the **Egremont Vision 2035 Initiative!** Comprehensive (Master) + Open Space and Recreation Plans

JOIN US!

Public Workshop #1:
A Vision (and Goals) for Egremont!
January 14, 2023 (snow date Jan. 21)

Public Workshop #2:
How To: Draft Strategies and Actions
March 11, 2023 (snow date Mar. 18)

Cafeteria at Mt. Everett High School
491 Berkshire School Road
Sheffield, MA 01257

Both meetings:
Open House
9am-12pm
Presentations at
9:15 and 10:45



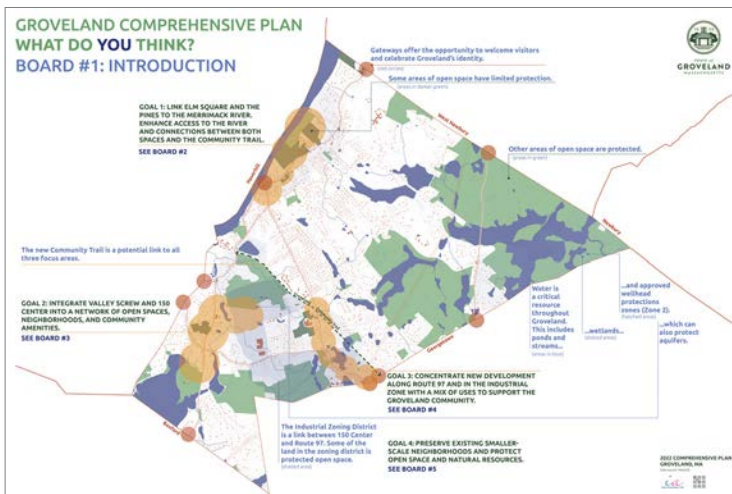
Take the questionnaire! Open on the website from January 2-28. Snow dates confirmed on website.

For the plan website, please go to:
<https://www.egremontvision2035.org/>
or use your phone to scan the QR code at left.

Egremont Comprehensive Plan Update

Town of Egremont

Innes Associates and Tighe & Bond are assisting the Town of Egremont with an update to their 2003 Master Plan and Open Space and Recreation Plan. A rural community of less than 2,000 people, Egremont relies on volunteers for much of their municipal work with a small full-time Town staff. Concerns include the balance of preservation and development and whether they should change their zoning to address economic development in their two villages. Egremont is a right-to-farm community and has significant protected open space.



Groveland Comprehensive Plan

Town of Groveland

Innes Associates and Form + Place are working on an comprehensive plan whose focus is three specific areas of town that are likely to change. Groveland has significant protected lands, much of which is designated as wildlife management areas and owned by the Commonwealth of Massachusetts. Development is limited to the town's historic center and the Route 97 corridor. The Town owns 60 acres of undeveloped land, which provides a historic opportunity to protect the underlying aquifer while allowing context-sensitive development to address the need for housing, economic development, and recreation.



Medford Comprehensive Plan

City of Medford

Agency Landscape + Planning is the lead on this project. Emily is the team's regulatory specialist and worked with members of Medford's arts, history, and cultural organizations to identify actions for inclusion in the recommendations and implementation plan. Emily worked directly with the Agency team to prepare for and facilitate meetings of the Steering Committee and public meetings. As the regulatory specialist, she evaluated options for changes to the City's zoning based on plan goals.



Image Courtesy of Harriman Associates

Scituate2040 Comprehensive Plan Update

Town of Scituate

APA-MA 2021 Comprehensive Planning Award

Emily Innes was the project manager for this project, leading a team of three urban designers/planners at Harriman and later completing the project as Innes Associates. FXM Associates and HSH Associates rounded out the consultant team.

The focus was on understanding the impact of needed infrastructure and facility upgrades, including measures to address climate change, sea level rise and the lack of town-wide sewer, on the potential for economic growth, including housing. The team used the lens of resiliency – social, economic, and environmental – to investigate Scituate’s needs and evaluate their options. Emily also created a framework the town could use to evaluate and prioritize competing needs for municipal investments.



Image Courtesy of Harriman Associates

South Hadley Plan Update

Town of South Hadley

Emily was the project manager for this project, leading a team of three urban designers/planners at Harriman and later completing the project as Innes Associates. Our colleagues from Tighe & Bond, prepared the Open Space and Recreation Plan and RKG Associates assisted on the economic development analysis. This effort included an intensive public engagement process in April 2019 that linked four community forums with parallel volunteered meetings-in-a-box to ensure the maximum number of voices were included in this initial visioning process.

Information and interactive exercises at each forum built upon the input from attendees at previous forums, so that the community conversation stretched across five major meetings and many smaller ones. Combinations of individual surveys, group discussions and mapping, and prioritization exercises helped build pictures of community visions and goals. Although delayed by COVID-19, the plan was adopted in 2021.



FIRM PROFILE

RKG Associates, Inc. is a full service economic, planning, and real estate consulting firm with offices located in Boston, MA, Alexandria, VA, Atlanta, GA, and Dallas, TX. Since our founding in 1981, the firm has successfully completed more than two thousand consulting projects regionally, nationally, and internationally, providing a comprehensive range of economic, planning, marketing and management services to governmental, business and institutional clients. The firm currently employs 9 full-time professionals, having grown to become one of the most respected economic and real estate advisory consulting firms in United States.

RKG Associates specializes in the application of economic analysis to economic development, real estate development, and financing issues toward the goal of attracting private sector investment and job creation. We have completed numerous economic development strategic plans and economic diversification strategies. Our approach is to synthesize the market, real estate, and fiscal analysis into an achievable, yet progressive, implementation strategy. Simply put, an economic development effort is only effective if it is accompanied by a detailed “road map” for the client to transition from vision to action. Our expertise transcends the location, size and scale of a community, having advised rural towns all the way to major metropolitan areas.

RKG Associates has assembled a group of highly qualified professionals who bring their own unique perspective to each assignment, and the firm’s strength lies in the diversity of backgrounds and disciplines represented within the organization. The talents of staff economists, planners, financial analysts, appraisers and real estate developers are brought together in a team effort to solve client problems. RKG Associates also has access to, and works with, a wide array of affiliates and consultants who provide technical expertise in such areas as architecture, urban design, engineering, environmental science, and associated disciplines.

RKG Associates Core Service Areas

Economic Consulting Services

RKG’s economic consulting services center on evaluating demographic, economic, real estate and industry-wide trends within a city, region, and/or state. This research allows us to evaluate the economic and fiscal impacts of a proposed facility or new development, create a target industry analysis, or formulate an economic development plan for an area. Economic Consulting services include:

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

Real Estate Services

Projects grounded in a market-based approach – regardless of industry – allows our clients to maximize the potential by identifying highest and best use, defining the market factors and associated impact on outcome expectations, and targeting consumer demand. The professionals at RKG have over 30 years of experience providing market research, development feasibility and financial feasibility consulting services to both the public and private sectors on a wide variety of real estate projects. Our project experience throughout the U.S. includes:

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

Planning Services

Sound planning positions an organization or community for success. Practical planning efforts enables agencies the ability to progressively meet their needs on an ongoing basis. Operation and organizational development focus on the people and processes that accelerate and improve growth initiatives. Simply put, focus is placed on the critical factors – the core mission and goals of the organization – so that adequate resources are allocated to the activities that provide the greatest benefit. When an organization is faced with crucial decisions that have the potential to infinitely impact all four critical elements of business – human resources, financial resources, physical resources, and capital – an impartial and factual based form of planning is required. RKG's planning professionals have special expertise in evaluating overall land use patterns, rezoning strategies to encourage new investment, project management, public process and the preparation of economic base and market studies in support of the municipal master planning process. Planning services includes:

- » Brownfields Redevelopment
- » Military Base Reuse
- » Municipal Master Plans
- » Tax Base Management Strategies
- » Municipal Service Studies
- » Open Space and "Smart Growth" Strategies
- » Transportation Planning
- » Real Estate Advisory Services



ERIC HALVORSEN, AICP
Vice President and Principal

Eric Halvorsen, AICP, has fifteen years of experience in land use, economic development, housing, and transportation planning. Eric’s diverse planning background provides a broad perspective making connections between the many facets that drive community decisions, inputs, and results. Eric also brings a wide range of project experience including work on master plans, downtown plans, economic and market studies, housing plans, and site specific plans. Additionally, he has managed multiple public engagement efforts, crafting processes for groups as small as five and as large as 300. These include highly interactive open houses, site walks, town hall meetings, small group facilitation, focus groups, and project working groups.

Eric’s focus has been and continues to be the formulation of realistic strategies that help catalyze change in the short- and long-term. Making connections between each facet of community development is a critical component to success. Eric enjoys learning, understanding, and leveraging those elements of a place that make it unique.

EDUCATION

- University of Illinois
Masters of City and Regional Planning
- Rutgers University
B.S. in Environmental Planning and Design
- Harvard University Executive Ed.
Urban Retail

PROFESSIONAL AFFILIATIONS

- Urban Land Institute
- Housing and Economic Development Council*
- American Institute of Certified Planners
- American Planning Association

COMMUNITY MASTER PLAN EXPERIENCE

- North Andover Master Plan**
North Andover, Massachusetts
- Natick Master Plan 2030+**
Natick, Massachusetts
- Littleton Master Plan**
Littleton, Massachusetts
- Winchester Master Plan**
Winchester, Massachusetts
- Medway Master Plan**
Medway, Massachusetts
- Mansfield Master Plan**
Mansfield, Massachusetts

ECONOMIC DEVELOPMENT AND MARKET STUDY EXPERIENCE

- Economic Development Plan**
North Central Mass Region, Massachusetts
- Economic Development Plan**
Framingham, Massachusetts
- Economic Development Update**
Billerica, Massachusetts
- CEDS Plan**
Bridgeport Region, Connecticut

HOUSING EXPERIENCE

- County Rental Housing Study**
Franklin County, Massachusetts
- Housing Production Plan**
Brookline, Massachusetts

**Additional Project Experience Provided Upon Request*



CHRIS HERLICH, AICP
Senior Planner/Analyst

Chris Herlich, AICP, has more than a decade of experience in consulting, advising local, state, and federal agencies in addition to nonprofits and businesses. Prior to joining RKG Associates, Chris spent more than five years as an urban designer in a large architecture firm. In addition to his quantitative and analytical skills, he uses his understanding of the physical realm and the implications of policy on the built environment to provide clients with strategic insight on the character and spatial qualities of their communities. He has a wealth of experience in city and district master planning; waterfront planning; geodesign; climate change, energy, and environmental consulting; and transportation planning. He focuses his professional practice on the ways data can inform, justify, and inspire design and development in urban environments, and communicating complex planning concepts to stakeholders in easily accessible media.

EDUCATION

University of Michigan
Master of Urban Planning | Graduate
Certificate in Real Estate Development

Carnegie Mellon University
B.S., Political Science & Economics

PROFESSIONAL AFFILIATIONS

Urban Land Institute
Boston Infrastructure Council

American Planning Association
American Institute of Certified Planners

ECONOMIC DEVELOPMENT AND MARKET STUDY EXPERIENCE

Master Plan
Methuen, Massachusetts (on-going)

Corridor Market Analysis
Danvers, Massachusetts

Economic Development Strategic Plan
Framingham, Massachusetts

Corridor Market Analysis
Westerly, Rhode Island

Toledo Neighborhood Revitalization Strategy
Toledo, Ohio

South Norwalk TOD Study
Norwalk, Connecticut

Corridor Market Analysis
Seekonk, Massachusetts (on-going)

Downtown Market Analysis
Lewiston, Maine (on-going)

COMMUNITY MASTER PLAN EXPERIENCE

Master Plan
Hamilton, Massachusetts

Master Plan
Medway, Massachusetts

Comprehensive Plan
Williamstown, Massachusetts

Master Plan
Johnston, Rhode Island

Master Plan
Braintree, Massachusetts (on-going)

**Additional Project Experience Provided Upon Request*



ERIK WOYCIESJES
Market Analyst

Erik Woyciesjes has three years of applied research and modeling experience in economic development, food systems and GIS applications. Erik’s background in academic research provides a broad array of experience in advanced quantitative methods and data driven approaches that he has applied to a wide range of projects including social equity strategies; market analysis; location analysis; housing studies and economic/workforce development analysis.

Erik brings a strong background in GIS and applied statistics which he pairs with his experience in applied research to connect key data insights with project goals and policy aims. Erik is an advocate of data driven approaches to addressing rapid urbanization, globalization and economic development.

EDUCATION

University of Buffalo
Masters of Urban and Regional Planning

Union College
B.A. in English Literature & Classics

PROFESSIONAL AFFILIATIONS

Urban Land Institute
American Planning Association
Association of Collegiate Planning Schools

PROJECT EXPERIENCE

Economic Impact Analysis of Housing on Downtown
Wakefield, Massachusetts

Racial Equity Strategy - Housing Data Analysis
Toledo, Ohio

TOD Economic Impact Analysis
Columbus, Ohio

Regional Affordable Housing Plans
South Coast Region, Connecticut

Private Development Economic Impact Analysis
Woburn, Massachusetts

Public Housing Market Study
Portsmouth, New Hampshire

Corridor Market Analysis
Danvers, Massachusetts

Affordable Housing Strategy
Berlin, Connecticut

HUD Technical Assistance Provider
Various Locations Across U.S.

Housing Strategy
Jefferson City, Missouri

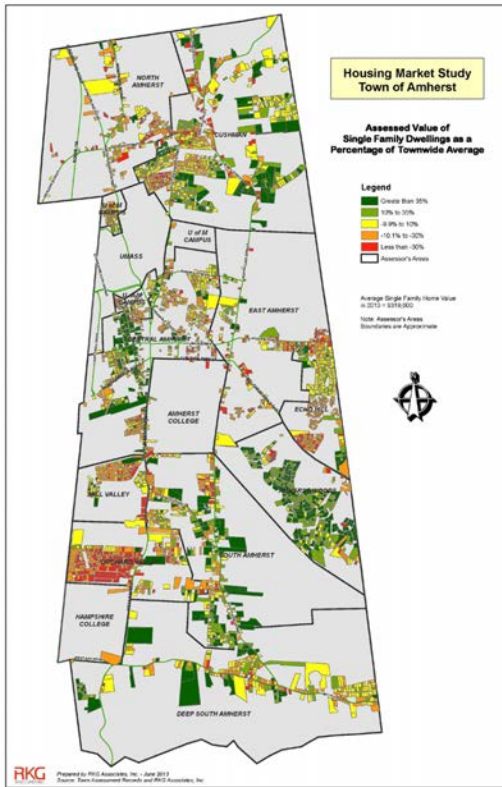
Consolidated Plan & NRSA
Toledo, Ohio

Comprehensive Plan - Housing Chapter
Bar Harbor, Maine

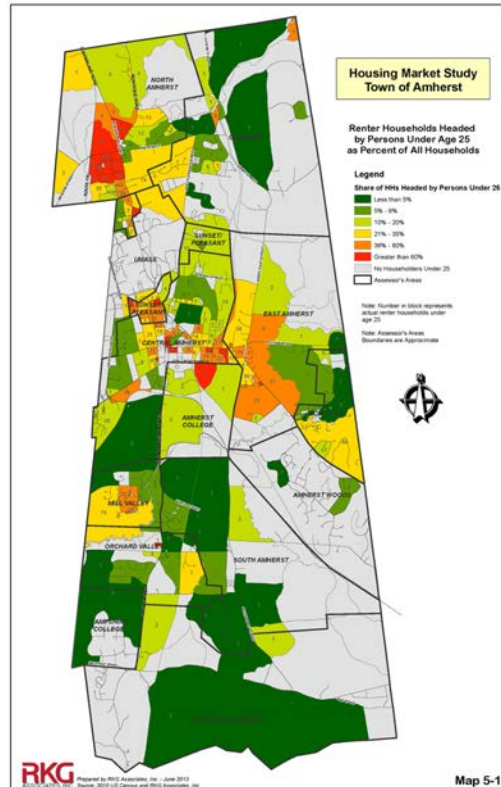
Neighborhood Revitalization Strategy Area Study
Bessemer, Alabama

**Additional Project Experience Provided Upon Request*

Residential Demand Study Town of Amherst, Massachusetts



Housing Value Map for Amherst



Housing Map by Occupants Under 25 Years of Age

RKG SERVICES

Demographic & Real Estate Market Analyses, Student Housing Assessment.

SITUATION

The Town of Amherst with 37,800 persons is located in Western Massachusetts and home to the University of Massachusetts, and Amherst and Hampshire Colleges, where enrollments totaled 30,900 students. Over the last decade, household growth in Amherst lagged behind the region; however, population gains in Amherst were substantial, driven primarily by enrollment growth. The lack of new student-housing during this period created increased demand from students for off-campus rentals in Amherst’s various neighborhoods; effectively forcing the non-student households to look elsewhere because of higher prices charged to students (parents).

RKG APPROACH/SOLUTION

RKG prepared an in-depth analysis of housing needs and identified gaps in the existing supply with future unmet demand in Amherst and its extensive region. RKG identified the specific demographics of households most likely to seek new housing in Amherst, and the mix of building types, units, and prices that could meet their needs. The degree to which Amherst’s existing housing stock met the housing demand and preferences of non-student households indicated different gaps in the types of housing, and annual housing demand was prepared in term of quantifying new owner and renter demand (non-student) over the near-term, as well as the potential for types of housing not available within the town.

RESULTS

RKG prepared a series of recommendations for the Town to encourage more diversity in the types and density of housing, to increase the development of more on-campus housing, and modify zoning.

Town Center Impact Study Ashburnham, Massachusetts

RKG SERVICES

Build out analysis, zoning analysis, fiscal impact analysis, project management, and client engagement.

SITUATION

The Town of Ashburnham was interested in analyzing the potential build out of a parcel of land currently occupied by the Town’s Department of Public Works located just south of Main Street. The Town viewed this parcel as key to catalyzing a revitalization of their town center by adding housing and some limited commercial development within walking distance to Main Street. RKG Associates was hired by MassDevelopment and the Town of Ashburnham to create an illustrative plan and build out analysis for the DPW parcel and several scenarios that included hypothetical development on surrounding privately owned parcels of land too. The resulting development was then analyzed for its net fiscal impacts to the town to determine if revenues from the new development could support a bond authorization for the relocation and construction of a new DPW facility elsewhere in town.

RKG APPROACH/SOLUTION

RKG created an illustrative site plan for five different development scenarios to determine the maximum number of housing units and commercial square footage based on current zoning and a more intensive zoning scenario with extended building heights. The development program for each scenario was then run through a fiscal impact model to gauge the net fiscal impacts of each scenario to the town to determine if added tax revenues were enough to support a municipal bond for the relocation and construction of a new DPW facility. In the end, none of the scenarios included enough development to cover the bond exactly, but did provide the town with some ideas for how the area could redevelop and what benefits new development might provide over time.

RESULTS

This project was completed in 2021 and the results were used to inform how the Town may proceed with relocating the DPW facility.



Site Plan for Potential Build Out of DPW Property

RKG Associates

Economic Development Plan Charlemont, Massachusetts

RKG SERVICES

Lead consultant managing entire project including sociodemographic analysis, market analysis, real estate analysis, industry sector and skills assessment, strategy identification, and public process.

SITUATION

The Town of Charlemont is a small, rural town located in Central Massachusetts along the Mohawk Trail and Deerfield River. Charlemont, like many rural communities, has a rapidly aging population and is heavily reliant on residential taxes to sustain municipal services with very little property tax revenue coming from commercial businesses. With the onset of the pandemic and strong desire for outdoor recreation options, visitors and tourists flocked to places like Charlemont that offers river activities, skiing, mountain biking, and hiking in a scenic location. The town was interested in how to best harness this new economic activity, manage it, and leverage it to drive year-round business growth and attract new, younger residents to town.

RKG APPROACH/SOLUTION

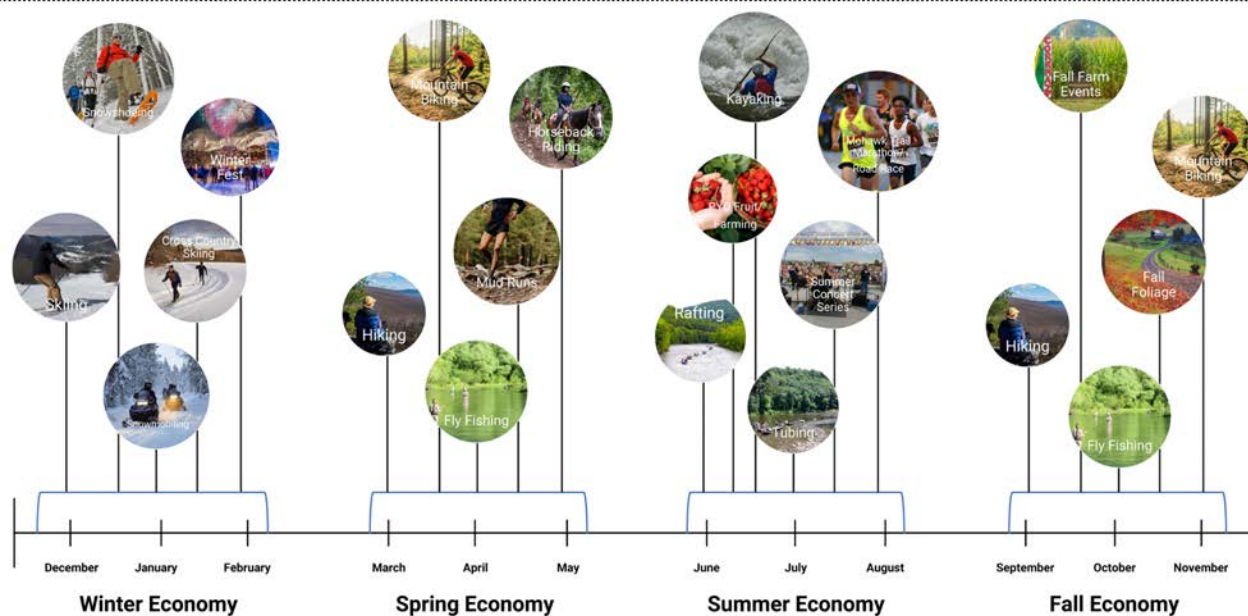
To help Charlemont understand and market its economic assets, RKG evaluated socioeconomic, industry sector, and real estate market conditions. RKG then identified strategies the town could undertake on its own and in partnership with regional organizations to market its assets and build a year-round economy. The strategy also looked at ways to bolster activity in the town center along the river by creating a new public riverfront park, additional parking, and community gathering spaces to bring residents together. The plan first sought to build a sustained tourism base and bring new money into the community, followed by longer-term strategies to attract younger workers and families to both live and work in Charlemont. By increasing the number of year-round residents the town could stabilize its tax base, create new jobs, and bring more expendable income to the town.

RESULTS

This project was completed in 2022 and is being used to inform a regional Deerfield River Economic Plan.

Creating a Year-Round Economy

A sampling of the activities and events to create a year-round draw to Charlemont for locals and visitors alike.
What's Missing?



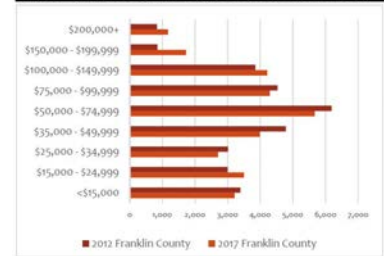
Rental Housing Market Study

Franklin County, Massachusetts



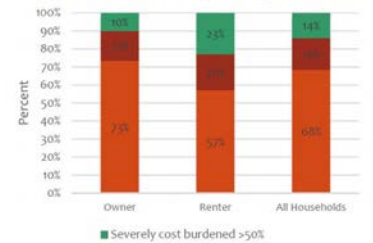
Shelburne Falls, MA. city-data.com

Figure 1: Household Income Cohorts, 2012-2017



Sources: US Census Bureau American Community Survey, 2013 & 2017 5-Year Estimates; RKG Associates.

Figure 4: Franklin County Housing Cost Burden



RKG SERVICES

Rental Market Analysis, Rental Housing Needs Assessment, Affordability Analysis.

SITUATION

Affordable rental housing in Franklin County plays a critical role in ensuring residents have a safe, decent and affordable place to live. Rural Development, Inc. was considering what to do with development funds to have the most impact on addressing housing issues across Franklin County and in the Town of Athol. As such, they commissioned a rental housing market study to better understand rental housing supply and demand at different income levels.

RKG APPROACH/SOLUTION

RKG Associates, as a subconsultant to Wendy Carter, compiled a rental housing market study for Franklin County and the Town of Athol. This study looked at how demographic and economic changes have, and may continue to, impact rental housing demand for households at different income levels. RKG also looked at how changes in different employment industries could drive demand for rental housing at different price points. An affordability mismatch analysis was conducted to look at housing availability and shortages at different bands of area median income to help Rural Development, Inc. understand where housing needs were greatest.

RESULTS

Rural Development, Inc. used RKG’s housing market study to prioritize their funding across Franklin County and look for opportunities to provide affordable housing where it was most needed.

Economic Development Plan North Central Massachusetts Region

RKG SERVICES

Lead consultant managing entire project including sociodemographic analysis, market analysis, real estate analysis, industry sector and skills assessment, strategy identification, and public process.

SITUATION

The North Central Massachusetts Development Corporation hired RKG Associates to undertake an economic development strategy for the North Central Massachusetts Region, which includes 27 communities from I-495 west to Athol and south to Barre, Sterling, and Clinton. The NCM Region is uniquely situated between the Greater Boston and Greater Worcester markets, yet there are economic engines within the region that compete for workers and talent. In recent years, the region has been able to attract and retain jobs in manufacturing, healthcare, and education as well as grow a robust tourism and service-based industry. A lower cost of living compared to neighboring regions provides housing options that might otherwise be out of reach for workers. While the region is performing well, there is a feeling that more can be accomplished with a new strategic direction, targeted efforts, and advancing partnerships.

RKG APPROACH/SOLUTION

In the first phase of the plan, RKG evaluated socioeconomic, industry sector, and real estate market conditions to better understand how the region is performing and what industries have historically been attracted to the region. RKG then identified target industry sectors the region should be pursuing and is worked to develop marketing and business support strategies to attract and retain businesses long-term to the region. The plan provides local and regional priorities for improving overall competitiveness for both workers and jobs.

RESULTS

This project was completed in Winter 2021.



Firm Overview

FOUNDED

1911

TEAM MEMBERS

450+

ZWEIG GROUP

BEST FIRMS
TO WORK FOR

ENR NEW ENGLAND
TOP DESIGN FIRMS

#7

For more than a century, Tighe & Bond has been a leading multi-disciplinary consulting firm in the Northeast, manifesting its clients' vision for a better built environment by providing full-service engineering, landscape design, site planning, and environmental services. Innovative thinking and exceptional service have always been at the core of our work.

In addition to our engineering and environmental expertise, Tighe & Bond's landscape design studio (Halvorson | Tighe & Bond Studio) offers a unique perspective creating more holistic solutions with an eye to unlocking each site's potential.

Our experienced professionals provide concept-to-completion expertise to comprehensively address the needs of our public and private clients. By focusing on bright ideas, green strategies, and clear solutions, the Tighe & Bond team develops creative, collaborative responses to complex challenges. We never stop evolving in order to keep pace with our ever-changing industry because moving forward is what we do.



SERVICES

Comprehensive/Master Planning

Coastal & Waterfront Solutions

Environmental Consulting

GIS/Asset Management

Landscape Architecture & Urban Design

Site Planning & Design

Transportation Engineering

Water & Wastewater Engineering



TRACY ADAMSKI, AICP

VICE PRESIDENT

Tracy Adamski offers a broad range of planning expertise in regulatory compliance, environmental permitting, land-use planning, grant writing, and public outreach. She has employed her in-depth knowledge of local, state, and federal environmental and land-use laws and regulations to successfully permit a broad range of complex projects, including renewable energy power generation facilities, electric utility infrastructure, resource area enhancements, municipal infrastructure improvements, and major office and retail development. Her experience includes land use planning, by-law development, energy resource permitting, brownfields redevelopment, wetlands and environmental resource permitting, stormwater planning and permitting, solid waste permitting, and infrastructure planning. Tracy's strengths include team coordination, project management and communication, regulatory analysis, and multi-agency permitting.

EXPERIENCE

25 Years

SPECIALTIES

Infrastructure Planning

Land-Use Planning

Environmental and Land-Use
Permitting

Stormwater Management

Grant Writing

Public Outreach

EDUCATION

Bachelor of Science
Biology

Worcester Polytechnic Institute

American Institute of
Certified Planners

Federal Energy Regulatory Commission
Training Environmental Review and
Compliance for Natural Gas Facilities

LICENSES & REGISTRATIONS

American Institute of Certified Planners
#125197

PROFESSIONAL AFFILIATIONS

American Planning Association

Northeast Energy and Commerce
Association

New England Women in Energy and the
Environment

RELEVANT EXPERIENCE

OPEN SPACE AND RECREATION PLANNING

Developed Open Space and Recreation Plans in compliance with the Massachusetts Division of Conservation Services requirements for Massachusetts communities. Recently completed the update to South Hadley's 2012 OSRP including facilitation of public input through surveys, public forums, and small group discussions, coordination with municipal staff and advisory group, and development of implementation plans. Previously worked with Needham and Winchendon to develop OSRPs

INTEGRATED WATER RESOURCE MANAGEMENT PLAN (IWRMP) EASTHAMPTON, MA

Worked with the City of Easthampton to develop an IWRMP that addresses wastewater, water, and stormwater infrastructure. Led the stormwater component, which included documenting the existing conditions of the City's infrastructure, identifying the major infrastructure maintenance needs, and developing a stormwater program and budget to address MS4 regulatory requirements. The final plan includes a prioritized list of recommended improvements. Presented findings at a series of public workshops.

LOCAL COMPREHENSIVE PLAN—BREWSTER, MA

Currently serving as project director for the Brewster Local Comprehensive Plan to prioritize actions from the Town's 2017 Vision Plan, develop land use policy to guide future change within the community and develop required plan elements for certification by the Cape Cod commission. Anticipate completion in 2021.

MASTER PLANNING—VARIOUS LOCATIONS

Developed comprehensive master plans and visioning for West Springfield, MA, Holliston, MA, and Thomaston, CT, as well as open space and recreation plans for Winchendon, West Springfield, and Holliston, MA. Facilitated public input through surveys and public forums. Advised local boards on planning issues, zoning changes, planning strategies, and funding sources for implementation of various goals including protection of community character and natural resources, expansion and improvements to infrastructure, and promotion of economic development. Drafted by-laws for resource protection, bike parking, mixed use developments, and stormwater management.



PUBLIC OUTREACH – VARIOUS LOCATIONS

Developed public outreach materials in support of stormwater management and related by-law articles including presentations at public meetings, town meetings, and community cable programs. Developed questions and answers to assist local officials with addressing public concerns and developed written materials for publication.

GRANT WRITING—VARIOUS LOCATIONS

Perform extensive and successful grant writing, including: MassWorks Infrastructure Program, Rural Development Funding, MassDEP State Revolving Funds, USEPA Brownfields Assessment Grants, MA Lakes and Ponds Grants, and MA Wellhead and Surface Water Supply Protection Grants. Assisted municipalities and regional planning agencies obtain millions of dollars of funding to support resource protection, brownfield assessment and redevelopment, and clean water initiatives.

MDC RECREATIONAL PROPERTY USE EVALUATION—VARIOUS LOCATIONS

The Metropolitan District Commission owns approximately 31,000 acres of land in Connecticut and Massachusetts, of which approximately 17,460 acres are open to the public for various recreational uses. Managed a comprehensive review of MDC’s existing recreational facilities and organizational practices related to the use of these facilities.

WATERSHED MANAGEMENT PLAN—NEWBURYPORT, MA

Developing an updated Watershed Management Plan to address land use concerns within the watershed as these uses impact the water quality of three interconnected surface water supplies. Additionally, assessed options for increasing redundancy and resiliency of the water supply by assessing a new transmission line for a direct connection to the uppermost reservoir and assessing options for dam reconfiguration to provide added protection from the potential for a backwater event and to minimize the length of the existing dam.

REGULATORY APPROVALS—MASSACHUSETTS

Has excellent track record of securing approvals in support of linear infrastructure development, commercial development, and energy projects. Has extensive knowledge of local, state, and federal wetlands, environmental laws and regulations including the following programs: MA Environmental Policy Act; National Environmental Policy Act; Interbasin Transfer Act; Sections 401 and 404 of the Clean Water Act; Section 10 of the Rivers and Harbors Act; Federal Endangered Species Act; MA Endangered Species Act; MA Wetlands Protection Act and Stormwater Management Policy; MA Chapter 91 Waterways; National Pollutant Discharge and Elimination System; MA Water Management Act; Section 106/Massachusetts Historical Commission; Article 97 Policy; Coastal Zone Management Federal Consistency regulations; Massachusetts Contingency Plan; MassDOT Highway Access Permits; Federal Aviation Administration; local zoning and wetlands by-laws.

COMPREHENSIVE WASTEWATER MANAGEMENT PLANS—VARIOUS LOCATIONS

Developed comprehensive wastewater management plans, analyzing various wastewater treatment and disposal options and environmental, growth management and cost implications for Mattapoisett, Sturbridge, Raynham, Agawam, and North Attleborough, MA. Analyzed existing and future needs, and assessed various wastewater management options, including sewers with centralized treatment and disposal, innovative/alternative systems, and decentralized treatment and disposal systems. Non-sewer alternatives analyzed included water conservation, stormwater management, zoning and non-zoning regulatory changes, and public education. Assessed water balance by sub-basins to address Interbasin Transfer Act review criteria.



SHARON ROONEY, AICP, RLA

PRINCIPAL PLANNER

Sharon Rooney specializes in land use and community planning, master plans and zoning strategies, coastal resilience planning, and design and permitting for private development. Her planning experience includes preparation of regional and local coastal community resilience plans and grant support for implementation efforts; preparation of local comprehensive plans; master plans and redevelopment planning for municipalities. Her private development experience includes coordination of regional regulatory review processes; development of regulatory tools and strategies for redevelopment; and permitting for large development projects in a sensitive coastal environment.

EXPERIENCE

32 Years

SPECIALTIES

Comprehensive planning

Coastal resilience

Land use planning/zoning

EDUCATION

Master of Landscape Architecture
Harvard University, Graduate School
of Design

Master of Public Administration
candidate, Suffolk University

Bachelor of Science Regional
Planning/Environmental Design
University of Wisconsin

LICENSES & REGISTRATIONS

Registered Landscape Architect
MA #1020

Member, American Institute of
Certified Planners, American Planning
Association (APA)

Certified MVP Provider

PROFESSIONAL AFFILIATIONS

Immediate Past Chair, American
Planning Association, Regional and
Intergovernmental Planning Division

Member, Ecological Landscape
Alliance

COMMUNITY PLANNING AND DESIGN

LOCAL COMPREHENSIVE PLANS—BREWSTER, SANDWICH, TRURO, MA

BREWSTER LOCAL COMPREHENSIVE PLAN

Project manager for the Town's first Local Comprehensive Plan (LCP), building upon a strategic visioning process completed by the Town in 2018 into targeted actions and capital facilities plan to guide the Town's growth and development and resource protection for the foreseeable future and provide consistency with the Cape Cod Regional Policy Plan and LCP Regulations.

TRURO LOCAL COMPREHENSIVE PLAN

Project manager for update to the 2005 Truro Local Comprehensive Plan to address a range of issues including housing, economic development, land use and environmental protection and provide consistency with the Cape Cod Regional Policy Plan and LCP Regulations. Initial efforts focused on public outreach including assistance with community survey, stakeholder outreach and GIS mapping.

SANDWICH LOCAL COMPREHENSIVE PLAN

Project manager for update to the 2010 Sandwich Local Comprehensive Plan to address a range of issues including housing, economic development, land use and environmental protection and provide consistency with the Cape Cod Regional Policy Plan and LCP Regulations. Initial efforts focused on development of existing conditions summaries and development of Goals and Policies for inclusion in the updated LCP.

VILLAGE CENTER PLANNING AND DESIGN STUDIES—ORLEANS, MA

Contributor to development of a corridor study, streetscape plan, and parking/circulation study for the Orleans, MA village center as Chief Planner for the Cape Cod Commission. Project scope included an evaluation of existing zoning, facilitation at Planning Board workshops and meetings with business owners, development of streetscape plan elements, and conceptual design plans. Project received a MA APA 2015 Project Planning Award.

DISTRICT OF CRITICAL PLANNING CONCERN—EASTHAM, MA

Led the designation of North Eastham, MA commercial district as a District of Critical Planning Concern as Chief Planner for the Cape Cod Commission. Managed a multi-disciplinary team that developed special zoning regulations to guide the form and character of future development in the District. Led



community workshops to assist local officials and the public in understanding development potential under existing regulations, developed conceptual approaches to guide new zoning, worked with design staff to develop 3D models to visualize future form, and developed dimensional standards to encourage mixed-use, affordable housing, and improved site design.

REGIONAL DESIGN GUIDELINES—BARNSTABLE COUNTY, MA

Project Manager and contributor to first regional design guidelines for Cape Cod communities as Planner for the Cape Cod Commission. Guidelines based on sustainable design principles for siting, building design, and landscaping based on context. Used by applicants in regional development review and adopted in whole or in part by several Cape Cod communities. Project and later update received MA APA Comprehensive Planning awards.

LAND USE PLANNING/ZONING

WALSH PROPERTY FEASIBILITY ASSESSMENT—TRURO, MA

Project manager for development feasibility study to define site development potential of approximately 70-acre site including environmental, regulatory, and other constraints. Evaluation of site's existing conditions and features affecting potential development and uses; evaluation of scope of jurisdiction of various regulatory agencies; and completed desktop environmental analysis of the site including GIS mapping.

RESIDENTIAL ZONING TASK FORCE—EASTHAM, MA

Currently assisting Town of Eastham in reviewing provisions in the Eastham zoning bylaw related to residential uses with the goal of expanding housing opportunities in the Town. Conducting research into options for inclusionary zoning, revisions to cluster residential zoning bylaw, and motel/cottage colony conversion to residential use.

MASSACHUSETTS MILITARY RESERVATION MASTER PLAN—BARNSTABLE COUNTY, MA

Project manager for community-led master plan development to achieve consensus on long-range military and civilian uses on a 22,000-acre military base while protecting future water supplies, rare wildlife habitat and open space. Facilitated public workshops with a 22-member Community Working Group (CWG) appointed by EOEA Secretary of Environmental Affairs consisting of civilian and military personnel and developed conceptual plans for inclusion in the MMR Master Plan Final Report.

LAND DEVELOPMENT AND PERMITTING

DEVELOPMENTS OF REGIONAL IMPACT—BARNSTABLE COUNTY, MA

Coordinated the regional regulatory review for large development projects proposed in Barnstable County referred to the Cape Cod Commission as Developments of Regional Impact (DRI) for consistency with the Cape Cod Regional Policy Plan. Negotiated permit conditions and drafted written decisions for review and approval by Cape Cod Commission board. Coordinated regional and local permitting with state and permitting agencies.

COASTAL RESILIENCE PLANNING

**MUNICIPAL VULNERABILITY PREPAREDNESS (MVP) PLANNING
EASTHAM, WELFLEET, TRURO, BARNSTABLE, PEPPERELL, MA**

Project manager and team member for MVP planning process for multiple MA communities to assess the community's vulnerability to and prepare for climate change impacts, build community resilience, and receive designation from the Executive Office of Environmental Affairs required for action grant program eligibility.

BREWSTER LOCAL COMPREHENSIVE PLAN

BREWSTER, MA

OWNER

Town of Brewster



SERVICES

Goals and Policies

GIS Mapping

Required Local Comprehensive
Plan Elements

Draft and Final Local
Comprehensive Plan

Tighe & Bond worked with the Town of Brewster to complete the Town's first Local Comprehensive Plan. Building upon a strategic visioning process completed by the Town in 2018, the Brewster Vision Plan goals and actions set the stage to develop a targeted action plan that incorporated these goals and actions into a plan framework consistent with the Cape Cod Commission's Regional Policy Plan.

Tighe & Bond's scope was designed to help the Town capitalize on these previous efforts and build upon the momentum already achieved through an equally robust, creative, and flexible planning process. Providing for sufficient stakeholder and public input was a key component of the planning process. GIS staff also developed maps of Brewster's natural resources and open space, water, coastal, and historic resources, and existing zoning and land use.

Tighe & Bond participated in monthly meetings with the Brewster Vision Plan Committee throughout preparation of the planning process and completed the layout of the draft and final LCP for public review. The LCP was presented at Fall 2022 Town Meeting and returned to the Vision Plan Committee for minor amendments.

The Town of Brewster will be the second Town on Cape Cod to develop and seek certification of its LCP under new Cape Cod Commission LCP regulations.

OPEN SPACE AND RECREATION PLAN UPDATE

SOUTH HADLEY, MA

OWNER

Town of South Hadley



SERVICES

Open Space and Recreation Plan
Community Assessment
Inventory of Open Space Land and
Environmental Resources
Outline of Community Needs and
Goals
Seven-Year Action Plan Survey
and Outreach

Tighe & Bond worked with the Town of South Hadley and Harriman to update South Hadley's 2012 Open Space & Recreation Plan (OSRP) concurrent with South Hadley's update to its Comprehensive Master Plan. The OSRP received approval from the Massachusetts Division of Conservation Services (DCS) maintaining South Hadley's eligibility for certain grant programs.

Tighe & Bond worked closely with Harriman to develop a survey and community forums to address the needs of both the OSRP and the Master Plan. The community input was used to update the vision for South Hadley's open space and recreation. Tighe & Bond also developed the required maps, and revised the OSRP by updating the inventory of lands of conservation and recreational interest, updated the needs analysis, goals, and objectives, and identified specific tasks for the seven-year action plan.

The public process included attending and facilitating numerous interviews and meetings with municipal staff and an OSRP advisory committee, developed and implemented a survey to identify community needs, and attending and facilitating three community forums. Members of the Town's Master Plan Implementation Committee also took the forums on the road in "meetings-in-a-box" thereby gathering input from a broader group of residents. The input from the public outreach was used to develop the goals, objectives, and seven-year action plan for the updated OSRP.

UPDATE PLAN OF CONSERVATION AND DEVELOPMENT

THOMASTON, CT

OWNER

Town of Thomaston



SERVICES

Master Planning

Public Outreach

Tighe & Bond worked closely with the Town of Thomaston Plan of Conservation and Development (POCD) Steering Committee to update Thomaston’s 2004 Plan of Conservation and Development. A POCD is a community’s “blueprint” for the future. It is the broadest policy document that the Town of Thomaston will have to guide decision-making on development and conservation over the next ten years and beyond. Tighe & Bond worked closely with the Steering Committee to create a Plan that provides an update on accomplishments since the 2004 POCD, analyzes current conditions, and identifies anticipated trends and visions for the future.

Tighe & Bond led the coordination of community-wide forums to seek input and create buy-in on the plan development and created an electronic survey to further solicit public input. Tighe & Bond summarized the current conditions and identified needs for the following elements in the POCD Update: Thomaston history, demographic trends, land use and growth patterns, housing, transportation, infrastructure and community services, and future Thomaston form. The plan includes a prioritized implementation and action plan with timelines and responsible parties for reaching the goals of the POCD.

FORMS

All forms in the RFP are on the following pages, except the Price Proposal, which is provided in a separately sealed envelope.

We have indicated terms in the sample contract that are not consistent with the contract previously signed by Innes Associates and would expect to discuss these terms if our team is chosen as the preferred consultant.

Attachment B: Affidavit of Clerk of Corporation Vendor

I, **Ewan J. Innes** certify as follows:

1. I am the Clerk of **Innes Associates Ltd.** which is duly organized and incorporated under the laws of Massachusetts.
2. That the names, residential addresses and title of the officers of the above-named corporation are as follows:

President: **Emily Keys Innes, AICP, LEED AP ND**

Address: **36R Moody Street, Byfield, MA 01922**

Vice President: _____

Address: _____

Treasurer: **Emily Keys Innes, AICP, LEED AP ND**

Address: **36R Moody Street, Byfield, MA 01922**

Resident Agent: _____

Address: _____

3. That the above-named corporation was incorporated on **November 2, 2020**
4. That the Corporation's Federal Tax Identification Number is **85-3721675**
5. That the above-named corporation is in good standing with the Secretary of the Commonwealth of Massachusetts or the Secretary of the State of _____ (if incorporated in another state)
6. That I, **Ewan J. Innes** have been authorized by a Corporate Vote, a copy of which is attached, to sign as agent for said corporation.

SIGNED UNDER THE PAINS AND PENALTIES OF PERJURY THIS 7th DAY OF
January, 2023

 _____

Clerk



Attachment C: Revenue Enforcement and Protection Certification (REAP)

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

ENTITY NAME: Innes Associates Ltd.

By: 
Authorized signature

January 7, 2023
Date

Emily Keys Innes, AICP, LEED AP ND
Name of person signing above (type/print)

36R Moody Street, Byfield, MA 01922
Business address

(781) 956-8556
Telephone Number

Attachment D: Non-Bribery and Collusion Affidavit

I, **Emily Keys Innes, AICP, LEED AP ND**, on oath depose and state that
(name of person signing proposal)

neither I nor any employees, officers or directors of **Innes Associates Ltd.**
(name of vendor)

have been convicted of any violations described as follows:

- a) Bribery or attempting to bribe a public officer or employee of the Town of Leverett, the State of Massachusetts, or any other public entity, including but not limited to the Government of the United States, any state, any local government authority in the United States in that officer's or employee's capacity, or
- b) An agreement or collusion among bidders or prospective bidders in restraint of freedom of competition by agreement to bid a fixed price or otherwise.

I further state that neither I nor any employees, officers or directors of **Innes Associates Ltd.** (name of vendor) have made an admission of guilt of such conduct in paragraphs (a) or (b) above, which is a matter of record, but has been prosecuted for conduct, has made an admission of guilt or such conduct which term shall be construed to include a plea of nolo contendere.



Signature of person signing proposal

This affidavit in the case of a business entity shall be executed by, in the case of partnership, the general partner(s), and in the case of a corporation, the president.

Signed under the pains and penalties of perjury this 7th day of **January 2023**.

Exhibit B

Certificate of Non-Collusion

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



Signature of person signing bid or proposal

Emily Keys Innes, AICP, LEED AP ND, President
Printed Name of person and title

Innes Associates Ltd.
Company name

January 7, 2023
Date

Exhibit C


SOMWBA Certification

Date of Certification by State Office of Minority and Women Business Assistance
(SOMWBA)

Note: This is now known as the Massachusetts Supplier Diversity Office (SDO).

<https://www.mass.gov/orgs/supplier-diversity-office-sdo>

November 3, 2022



Authorized Signature

January 7, 2023

Date

Emily Keys Innes, AICP, LEED AP ND, President, Innes Associates

Printed Name

Contract

Note: I have identified in red those paragraphs that differ from my last executed agreement with the Town of Leverett and that I would expect to negotiate with the Town should this consultant team be chosen for the Phase 2 services.

TOWN OF LEVERETT **AGREEMENT FOR PROFESSIONAL SERVICES**

THIS AGREEMENT (this "Agreement") between the **Town of Leverett**, a Massachusetts municipal corporation with a mailing address of PO Box 300, Leverett, MA 01054, acting by and through its Selectboard (the "Town"), and _____, a Massachusetts _____ with a mailing address of _____ (the "Contractor"), is effective as of the _____ day of _____, 2023 (the "Effective Date"). The Town and the Contractor are together the "Parties" and individually a "Party." In consideration of the mutual covenants contained herein, the Parties agree as follows:

ARTICLE 1: SCOPE OF SERVICES

The Town hereby retains the Contractor and the Contractor hereby agrees to provide professional _____ services for the Town as set forth in Exhibit A (the "Scope of Services"). **The Contractor agrees that time is of the essence of this Agreement.**

ARTICLE 2: PERFORMANCE STANDARD

In the performance of the Scope of Services, the Contractor, and those it is responsible for, shall exercise the degree of skill and care customarily accepted as best practices by members of the same profession currently practicing under similar conditions in the same locality. Substandard services shall be deemed a breach of this Agreement. By entering this Agreement, the Contractor represents to the Town that it has the skill, qualifications, experience, equipment, and manpower necessary to complete the Scope of Services.

ARTICLE 3: TERM

This Agreement shall commence on the Effective Date and continue until completion of the Scope of Services, or _____, 2023, whichever occurs first (the "Term"), unless such term is extended by mutual agreement of the Parties.

ARTICLE 4: TERMINATION

This Agreement may be terminated before the expiration of the Term as follows:

- (a) By mutual written agreement, duly entered by the Town and the Contractor, upon such terms and conditions as may be acceptable to the Parties at the time of termination; or

Workers' Compensation	Statutory Limit
Employers' Liability	\$500,000
Bodily Injury Liability (except automobile)	\$1,000,000 each occurrence \$2,000,000 aggregate
Property Damage Liability (except automobile)	\$1,000,000 each occurrence \$2,000,000 aggregate
Automobile Bodily Injury Liability	\$1,000,000 each person \$2,000,000 each occurrence
Automobile Property Damage Liability	\$1,000,000 each occurrence
Excess Umbrella Liability	\$1,000,000 each occurrence

The Town shall be named as an additional insured under the liability and automobile insurance. The general liability insurance policy should contain a broad form general liability endorsement.

ARTICLE 9: INDEMNITY

a. To the fullest extent permitted by law, the Contractor shall defend, indemnify, and save harmless the Town, Selectboard, and its respective duly elected or appointed officials, agents and employees (referred to collectively as "Town") from and against all demands, claims, damages, liabilities, losses, costs, and expenses (including, but not limited to, reasonable attorney fees) (referred to collectively as "demands") arising out of or resulting from any work performed pursuant to this Agreement including but not limited to any negligent acts, errors, or omissions of the Contractor, any subcontractor of the Contractor, or any person directly or indirectly employed by any of them, or by a defect of a product or design supplied by the Contractor or subcontractor. Such obligation shall not negate, abridge, or reduce in any way any additional indemnification rights of the Town, that otherwise may exist under statute or in law or equity.

b. Contractor assumes full responsibility for relations with any subcontractors employed directly or indirectly by the Contractor and the Contractor shall defend, indemnify, and save harmless the Town from all demands made against the Town by such subcontractor, such subcontractor's agent or employee, or any person, as the result of such subcontractor's work performed pursuant to this Agreement including but not limited to negligent acts, errors, or omissions that arise out of, result from, or are connected with the performance of this Agreement or any subsequent Agreement and is not otherwise subject to indemnifications under subparagraph "a" above.

c. The Contractor shall defend, indemnify, and hold harmless the Town from any and all demands relating to wages, overtime compensation, or other employee benefits by employees employed directly or indirectly by the Contractor for work performed in connection with the work hereunder or required by state or federal law, including but not limited to **Fair Labor Standards Act and Massachusetts Prevailing Wage Law.**

d. The indemnification obligations of the Contractor and subcontractor shall not be limited in any way by any limitations on the amount or type of damages, compensations, or benefits payable by or for the Contractor or subcontractor under any federal or state law.

e. In the event of a breach of this Agreement by the Contractor, the Contractor shall pay the Town all reasonable attorney fees, costs and other litigation expenses incurred by the Town in enforcing its rights as a result of said breach in addition to any damages for said breach.

ARTICLE 10: MODIFICATION, WAIVER OR CHANGE

No modifications, waiver or change shall be made in the terms and conditions of this Agreement, except as may be mutually agreed upon in writing by all parties hereto.

ARTICLE 11: SUCCESSORS AND ASSIGNS

This Agreement shall inure to the benefit of, and be binding upon, the successors and assigns of each of the parties hereto.

ARTICLE 12: MARGINAL HEADINGS, PRONOUNS

The marginal headings used in this Agreement are for convenience only and shall not be deemed to be a binding portion of this Agreement. The pronouns he, she, or it, are also used for convenience, and in the event that an improper pronoun has been used, it shall be deemed changed so as to render the sentence in which it is contained effective in accordance with its terms.

ARTICLE 13: VIOLATION OF LAW

The Contractor shall strictly observe and comply with all federal, state and local laws and regulations which may govern the work to be performed as herein specified.

ARTICLE 14: NONDISCRIMINATION

The Contractor shall not discriminate against any person because of race, gender, age, color, religion, ancestry, handicap, sexual orientation, sexual identity, gender identity, veteran status, national origin or any other protected class under the law.

ARTICLE 15: GOVERNING LAW

This Agreement shall be governed by the laws of the Commonwealth of Massachusetts.

ARTICLE 16: VENUE AND JURISDICTION

Venue and jurisdiction of any action will only be brought in the Commonwealth of Massachusetts, County of Franklin.

ARTICLE 17: ENTIRE UNDERSTANDING

This Agreement, together with the attachments hereto, if any, represent the entire understanding of the parties, and neither party is relying upon any representation not contained herein.

ARTICLE 18: SEVERABILITY

In the event that any provision of this Agreement shall be deemed invalid, unreasonable, or unenforceable by any court of competent jurisdiction, such provision shall be stricken from the Agreement or modified so as to render it reasonable, and the remaining provisions of

