



February 18, 2022

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

Re: Request for Proposals for Phase 1 of the Development of a Master Plan

Dear Ms. McGinnis:

I am delighted to submit a proposal to assist the Town of Leverett with the first phase of its comprehensive planning process. This first phase will set the stage for a successful comprehensive planning process that will help the town develop a plan that can guide future efforts by volunteers and investments by the Town itself.

The Town of Leverett is small in terms of population, but not in terms of the community's need for a well-designed planning process to address the concerns of residents about the future of the town. These concerns include housing, economic development, fiscal sustainability, and climate resiliency, among others. As a former chair of a municipal finance committee and as a former member of a municipal Planning Board, I understand many of the pressures that communities face from the perspective of town government as well as that of a consulting planner.

I founded Innes Associates in 2020 to work with communities of all sizes throughout New England to consider those issues and the balance required by communities who have strong hopes for their communities but limited resources. Although much of my experience is in Gateway Cities, I live and work in a right-to-farm town and I am deeply invested in exploring the needs of smaller and more rural communities. In addition to this proposal for Leverett, I have just begun working with the Towns of Egremont and Groveland, both with a similar need to balance their vision with their resources.

I applaud the Planning Board's strong commitment to engaging the many voices of the community in this process. I hope to help the Planning Board identify possible tools and strategies in this phase that will support that engagement process in the next phase. One of those tools is a base of common data that can be used to support the discussions, sometimes difficult, that will be required in phase 2. Based on my previous work with master planning processes and other planning efforts I have led, I am qualified to help the Working Group evaluate what they have and what they need for those discussions.

**Innes Associates Ltd.**  
**36R Moody Street**  
**Byfield, MA 01922**  
**info@innes-design.com**  
**(857) 226-3815**

I understand that the Town requires a planning framework to best target its resources, including additional grant funding for the next stage of the process and the time and energy of its volunteers who already put so much effort into the governance of town affairs.

Please let me know if you have any additional questions. I look forward to future discussions about the proposed scope and the Town's goals for this planning process.

Sincerely,



Emily Keys Innes, AICP, LEED AP ND

Principal

emily@innes-design.com | (781) 956-8556 cell

Image on front cover

Darling, E. (July 1830). Plan of Leverett made by E. S. Darling, dated July 1830 [Map]. Retrieved from <https://ark.digitalcommonwealth.org/ark:/50959/25152k109>

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**Attachment A: Price Proposal Form is provided in a separately sealed envelope.**

## MINIMUM AND COMPARATIVE CRITERIA

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| Minimum Criteria  |   |
|---|---|
| Innes Associates is a responsive and responsible bidder.  | ✓   |
| Innes Associates has submitted all required forms, properly completed and executed.                                 | ✓   |
| Proposer has submitted all required explanations and documentation.   | ✓   |
| Proposer must meet all material and mandatory terms and conditions of the Town's service contract.                  | The Town's service contract is subject to review by Innes Associates' insurance agent and appropriate discussion with Town counsel.   |
| Comparative Criteria  |   |
| <p><b>Master Plans</b></p> <p>An advantageous proposer will have developed one to three municipal master plans.</p> | <p>Emily Innes was the project manager for two master plans/plan updates, one for the Town of West Warwick, Rhode Island and one for the Town of Scituate, MA. The plan for Scituate won the <b>APA-MA 2021 Comprehensive Plan Award</b>.</p> <p>Emily Innes was the project manager for the Town of South Hadley's master plan which will have its final hearing in March 2022.</p> <p>Innes Associates is a member of the team for the City of <b>Medford's</b> comprehensive planning process, which will be completed late summer 2022.</p> <p>Innes Associates is the lead consultant on the comprehensive planning processes for <b>Egremont</b> and <b>Groveland</b>. The planning process for both kicked off in early 2022.</p> <p>Please see <b>References</b> with links to the completed and draft plans below.</p> |

## Comparative Criteria

### References

The highly advantageous proposer will have four or more positive professional references from similarly sized municipalities for master plan work.

Innes Associates has four references for master plan work. Most of the communities are larger than Leverett.

Please see **References** below.

### Resumes of principal engagers

The highly advantageous proposer will have an AICP or other professional planning designation.

Emily Innes holds the AICP designation.

Please see **Resume** on page 8.

### Zoning Knowledge

The highly advantageous proposer will have 5+ years of experience with Massachusetts General Laws pertaining to zoning and sub-divisions.

Emily Innes is a regulatory specialist and has over 11 years of experience as a consulting planner and ten years of experience as an elected member of a town Planning Board in Massachusetts.

## References

*Scituate2040 Master Plan Update (2021)*  
**APA-MA 2021 Comprehensive Plan Award.**  
<https://bit.ly/3HTgdRr>

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

Town of South Hadley Master Plan Update  
(anticipated March 2022)  
<https://bit.ly/3rTCPvD>

**Anne Capra**, Director, Planning & Conservation  
acapra@southhadley.ma.gov  
(413) 538-5030, ext. 6187

*West Warwick Comprehensive Plan Update 2020 (2020)*  
<https://bit.ly/3BrOogK>

**Mark Carruolo**  
Town Planner, North Smithfield  
(formerly Town Planner, Town of West Warwick)  
(401) 767-2200 ext.336

City of Medford Comprehensive Plan  
(anticipated August/September 2022)

**Alicia Hunt**, Director of Planning, Development, and Sustainability  
ahunt@medford-ma.gov  
**Amanda Centrella**, Planner  
acentrella@medford-ma.gov  
(781) 393-2480

## PROPOSED SCOPE OF WORK

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### **Task 1: Project Initiation**

*This task sets the stage for a successful first and second phase of the planning process for the Town's master/comprehensive plan.*

#### Task 1.1 Kick-off meeting

Innes Associates will meet virtually with the Planning Board to discuss the project and timeline. The meeting will include a discussion of the following:

- Potential members of the Working Group and outreach strategies
- Outreach strategies to promote inclusion of and engagement with the stakeholders
- Options for the planning and approval process

#### Task 1.2 Meeting with the Working Group

The first meeting with the members of the Working Group will be held in person, if allowed by Town policy. This meeting will include an exchange of previous planning documents and a discussion of their importance for the planning process. The meeting will also include a discussion of the scope of work and timeline for the first phase of the planning process and the roles and responsibilities of the members of the working group and Innes Associates.

#### Task 1.3 Site Walk

Innes Associates and the members of the Working Group will tour key sites and spaces in town, identifying the relevance for each in the planning process. This can be done on the same day as the meeting with the Working Group, if that meeting is in person.

#### Task 1.4 Document Review

After the meeting and site walk, Innes Associates will review all provided planning documents (including the list provided in the RFP), the Zoning Bylaws, regional planning documents with relevance to the Town of Leverett, and other documents discussed during the meeting with the Working Group.

### **Task 2: Existing Conditions**

*This task creates the basis of understanding that will help inform phase 2 of the planning process.*

#### Task 2.1 Baseline Understanding and Mapping

Innes Associates will work with the members of the Working Group to develop an understanding of the existing conditions with a focus on those elements required by Section 81D, and specific themes that are appropriate for the Town of Leverett. These themes could include sustainability, resiliency, public health, cultural asset development, the intersection of smart growth and climate adaptation, or other themes

specific to this planning process. This discussion should take two meetings – the first to discuss the existing conditions and identify gaps for additional research and the second to discuss potential implications for the planning process.

### Task 2.2 Visioning Process

Innes Associates will create a plan for the visioning process in the next task, including collaboration with the Working Group to identify the optimal number of meetings needed for Phase 2. This discussion should take place at a dedicated meeting and include a discussion of various methods for outreach and engagement to ensure a wide representation of community voices within the process.

### Task 2.3 Report

Innes Associates will prepare a report to document the process, including the following:

- Existing planning documents and a summary of their relevance to the planning process
- Baseline maps of assets and areas of concern
- Available data from the US Census and/or regional plans with relevance to the planning process
- Missing data or areas requiring additional research
- Potential focus areas for further discussion
- Plan for visioning process, including community outreach

### **Summary of Meetings and Deliverables**

- Total meetings: 5-6, depending on virtual vs. in-person
- Final report with appropriate maps, tables, and illustrative graphics



## Emily Keys Innes, AICP, LEED AP ND

Emily Innes is an award-winning planner with over ten years of experience in planning and urban design. 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. Over those ten years, Emily has been either project manager or project director for over fifty-five projects. Her clients are communities of all sizes, state agencies, and private developers - in Massachusetts, Rhode Island, Connecticut, New York, New Hampshire, and Maine.

### Selected Awards

APA-MA Comprehensive Plan:  
Scituate2040 Master Plan Update. 2021

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

APA-MA Neighborhood Plan:  
CSX Area Master Plan. 2019

APA-MA President's Award:  
LawrenceTBD Urban Renewal Plan. 2017

Salem Historic Inc:  
Salem Downtown Renewal Plan. 2011

### Certifications

American Planning Association:  
Certified Planner (AICP)

USGBC:  
LEED AP Neighborhood Development

Commonwealth of Massachusetts:  
MVP-Technical Services Provider

### Education

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 Professor

### Selected Project Experience\*

\*Experience with The Cecil Group/Harriman Associates.

\*\* As Harriman Associates and Innes Associates.

### COMPREHENSIVE PLANNING

#### Town of Burlington, Massachusetts

Completion of Comprehensive Master Plan

#### Agency Landscape + Planning/City of Medford, Massachusetts

Comprehensive Master Plan

#### Town of Newbury

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

### MASSACHUSETTS MVP PROGRAM

#### Town of Boxford, Massachusetts\*

Municipal Vulnerability Program (MVP) Planning Services

#### Town of Harvard, Massachusetts\*

Municipal Vulnerability Program (MVP) Planning Services



## MASSACHUSETTS DOWNTOWN INITIATIVE PROGRAM

### **DHCD: Local Rapid Recovery Program**

Plan Facilitator (3 communities); Subject Matter Expert (25 communities); Sign and Façade Program Toolkit

### **DHCD: MDI/Town of Burlington, Massachusetts\*\***

Placemaking strategies for Lower Town Center

### **DHCD: MDI/City of Chelsea, Massachusetts**

Bilingual permitting guide for small businesses

### **DHCD: MDI/City of Greenfield, Massachusetts**

Facade to facade public realm guide

### **DHCD: MDI/Town of Marshfield, Massachusetts\*\***

Placemaking strategies for Library Square

### **DHCD: MDI/Town of Maynard, Massachusetts\*\***

Placemaking strategies for Naylor Court

### **DHCD: MDI/Town of North Adams, Massachusetts\*\***

Placemaking strategies for Downtown Cultural District

### **DHCD: MDI/Town of South Hadley, Massachusetts\*\***

Visualization strategy for Redevelopment Site

### **DHCD: MDI/Town of Sterling, Massachusetts\*\***

Town center design guidelines

### **DHCD: MDI/Dracut, Massachusetts\*\***

Placemaking strategies for the Navy Yard area

### **DHCD: MDI/Milford, Massachusetts\***

Housing Study

### **DHCD: MDI/Newburyport, Massachusetts\***

Wayfinding Study

### **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

### **DHCD: MDI/Town of Winthrop, Massachusetts**

Development of a facade/storefront improvement program

## 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

**SNEAPA 2018: The Malden River: Connections and Collaborations**

**SNEAPA 2017: Do Downtowns Matter?: Managing Community Conversations**

**SNEAPA 2016: Getting from Now to Success: Implementing the Plan**

**SNEAPA 2016: Reaching New Communities: Engaging Residents Unfamiliar (or Suspicious!) with the Planning Process**

**ULI Boston/New England Member Lunch September 11, 2015: Developing Resiliency**

**MAPD 2014: Communities and Consultants: Best Practices for Best Results**

**ABX 2013: Preparing for the Rising Tide**, in partnership with the Boston Harbor Association and the Museum of Science

**SNEAPA 2013: Redevelopment Agency: A Model for Revitalizing Downtowns**, in partnership with the Town of West Warwick

## PUBLICATIONS

Streamlining the Development Process, Banker & Tradesman, July 24, 2016

Contributor: A Call to Action on Sea Level Rise, Banker & Tradesman, October 4, 2015

Contributor: Developing Resilience: Living with Water Strategies for Greater Boston, ULI-Boston/New England, September 2015