

# CPTC Annual Conference 2023



**Saturday, March 18, 2023**

**Hogan Campus Center, Holy Cross College, Worcester, MA**

The CPTC Annual Conference offers 17 workshops on core planning topics and timely planning issues. The Conference includes a continental breakfast and buffet lunch. There are 3 sessions of workshops. You may choose 1 workshop each session. All workshops focus on Massachusetts land use issues and are presented by an expert in the the field. Workshops with (MIIA) in the title provide MIIA insurance credit.

The fee for the Conference is \$95. Advance registration is required. Payment can be made by credit card online or by mailing a check. Registration closes March 14, 2023 at 5:00 pm. The Conference is an in-person event. Workshops will not be recorded. [Payment, cancelation and other Conference policies.](#)

[Register for CPTC Annual Conference 2023.](#)

## Conference Sponsors



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**Workshop List & Schedule**

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**8:00 a.m. – 8:30 a.m. Registration and Continental Breakfast**

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**8:30 a.m. – 9:00 a.m. General Opening/Welcome**

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**9:15 a.m. – 10:45 a.m. Early Morning Session**

**1. Roles and Responsibilities of Planning and Zoning Board of Appeals (MIIA)**

Join us if you are a new Board member or building inspector. This program will launch you into your role as a local official, introduce you to the functions of the two boards and the main tools of planning and zoning. This session will also include an introductory discussion of the Open Meeting, Public Records, and the Conflict of Interest Laws.

- **Speaker: Bob Mitchell** FAICP, Planning Consultant, Boston, MA
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**2. Writing Reasonable and Defensible Decisions (Including Hearing Requirements) (MIIA)**

This course covers some key points that will assist boards in writing clear and defensible decisions and why that is important. It describes criteria that should be contained in local zoning provisions and how they relate to the drafting of the decision and the conditions a board may impose when approving a special permit or variance application. This session covers legal and procedural requirements for conducting a public hearing and the ramifications of failure to follow procedural regulations in the decision-making process.

- **Speaker: Adam J. Costa**, Partner, Mead, Talerman & Costa, LLC
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**3. Small-Scale, All-Affordable Housing Developments: Challenges and Opportunities**

During this session, a panel of affordable housing experts will discuss what it takes to build and manage small, neighborhood-scale projects that offer deeply affordable homes. For-profit and non-profit developers with experience creating affordable and attainable housing will present their experiences, explain what works or doesn't work, and describe what communities can do as advocates and partners to make developments like these a reality.

- **Speakers:** *Judi Barrett, Principal, Barrett Planning Group; Mathieu Zahler, Principal, MPZ Development; Jason Korb, Principal, Capstone Communities; Will Monson, Senior Project Manager, Homeowner's Rehab*

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#### **4. Digital Equity Planning and the Digital Divide**

MBI and the Commonwealth of Massachusetts are committed to closing the digital divide and ensuring digital equity for all residents. The COVID-19 pandemic has brought heightened attention to the importance of broadband access and adoption in almost every facet of daily life. Access to affordable broadband service is no longer considered a luxury, but an essential utility. The need for broadband in the 21st century is often compared to the need for electricity or phone service in previous centuries. Achieving digital equity in the Commonwealth is a critically important goal for our future prosperity. The lack of digital equity impacts our society in profound ways – hindering our citizens' access to economic prosperity, health care, educational attainment, and civic and social engagement. Learn how your community can benefit from digital equity planning grants.

- **Speaker:** *Josh Eichen, Program Manager, Partnerships, Massachusetts Broadband Institute (MBI)*

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#### **5. Zoning for Multi-family Housing per Chapter 40A Section 3A (The MBTA Communities Zoning Law)**

Now that your municipality has achieved interim compliance with Section 3A/MBTA communities, what is next? Join DHCD 3A staff to discuss the requirements of the law and guidelines and what implementation means for your community. Additionally, staff from the Local Initiative Program will discuss the Local Action Unit process.

- **Speakers:** *Chris Kluchman, FAICP, Deputy Director, Community Services Division, Department of Housing and Community Development (DHCD); Emma Snellings, Regional Planner, DHCD; Rieko Hayashi, Local Initiative Program Director, DHCD; Aly Sabatino, LIP/HOP Coordinator, DHCD*

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## 6. Building Community Resilience – Tools and Resources

Communities are feeling the impacts of more intense storms and more frequent droughts and heat waves. Municipalities can minimize impacts by adopting plans and land use rules that support nature-based climate solutions. Benefits include reduced flood risks, protection of water quality and supplies, reduced costs of road and stormwater maintenance, and preserving community character. We'll share a Bylaw Review Tool that can help you give your community's land use regulations a tune-up to ensure they support cost-effective best practices. Learn about resources from the state including the Municipal Vulnerability Preparedness (MVP) Program. Check out the updated BioMap and see how it helps you identify priorities for protecting the most important open spaces in your area.

- **Speakers:** *Stefanie Covino, Program Manager, Blackstone Watershed Collaborative; Eve Schluter, Assistant Director, MassWildlife*
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## 11:00 a.m. – 12:30 p.m. Late Morning Session

### 7. Zoning Exemptions (MIIA)

Section 3 of the Zoning Act provide certain exemptions for agricultural, educational, childcare and religious uses, as well as state and federal lands and uses, from local zoning regulations. This course explains these exemptions and their purpose; what does it mean to be exempted from zoning requirements; and identifies under which circumstances municipalities can enact and impose zoning regulations. The course will also cover how judicial decisions guide the way this section of the Zoning Act is interpreted.

- **Speaker:** *Barbara J. Saint André, esq., Director, Community and Economic Development, Town of Medway*
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### 8. Drafting Zoning Amendments (MIIA)

While regular review and amendment of a municipality's zoning ordinance or bylaw in response to changing needs and circumstances is essential to ensuring that it remain up-to date, the process can be tricky. This course will provide a step-by-step roadmap on how to adopt and amend zoning codes in accordance with the strict requirements of G.L. 40A Section 5. Local officials and staff will gain an understanding of what type and scope of amendments are permissible, the relationship between zoning

and other municipal planning documents, and the essential role of the Planning Board in the process. Tips for drafting zoning amendments and strategies for successfully getting them passed will also be addressed.

- **Speaker: *Jonathan Silverstein, Partner, Blatman, Bobrowski, Haverty & Silverstein, LLC***

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## **9. Policy Making for Short-Term Rentals**

This session will explore how communities around the Commonwealth (and beyond) have addressed short-term rentals (STRs). We will touch on the SJC decision in *Styller v. Zoning Board of Appeals of Lynnfield* (2021) and how communities are responding to it, how they are approaching regulating STRs through zoning and non-zoning means, how the registration process works, and what some of the challenges and issues have been in those communities. Ample time will be provided for Q&A.

- **Speakers: *Judi Barrett, Principal, Barrett Planning Group; Stacie Smith, Managing Director, Consensus Building Institute; Jeffrey Goodman, Planning Consultant, Granicus; Gwen Miller, Land Use Director, Town of Lenox***
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## **10. Working with MGL Chapter 40B (MIIA)**

A workshop for municipal staff and local boards reviewing applications for projects seeking a comprehensive permit under G.L Chapter 40B. Topics will include the following: reviewing the initial application for completeness and compliance with state and local requirements; conducting a site visit; managing the public hearing process; retaining Peer Review consultants; making an informed decision consistent with the local needs provided for in the statute; drafting and issuing the Comprehensive Permit decision; and working with developers, abutters, and other interested parties. This workshop will focus on how municipal officials as well as others can use 40B to achieve housing goals as well as some of the permitting requirements involved with 40B.

- **Speakers: *Paul Haverty, Partner, Blatman, Bobrowski, Haverty & Silverstein, LLC; Phillip DeMartino, Senior Technical Assistance Coordinator, Community Assistance Unit, Department of Housing and Community Development (DHCD)***
- **Moderator: *Becca George, Regional Planner, Community Assistance Unit, DHCD***
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## **11. Community One Stop for Growth**

Learn about the state's single application portal to access funding from 12 different community economic development programs that make targeted grant investments based on a Development Continuum. The Executive Office of Housing and Economic Development (EOHED) partners with the Department of Housing and Community Development (DHCD) and Massachusetts Development Finance Agency (MassDevelopment) to carry out this cross-agency effort. This coordinated process is designed to provide a more streamlined experience for applicants and to make the programs more accessible to all types of organizations, large and small, in all regions of the state.

- **Speakers:** *Juan R. Vega*, Assistant Secretary for Communities and Programs, Executive Office of Housing & Economic Development (EOHED); *Shyla Ruffer Matthews*, Vice President of Community Development, MassDevelopment; *Patrick Shannon*, Community One Stop Coordinator, EOHED
- **Moderator:** *Jacqueline Furtado*, AICP, Senior Program Manager, EOHED, CPTC Board member
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## 12. Planning for Solar – Statewide Studies and Toolkit for Communities

To meet the state's Clean Energy and Climate Plan goals, between 25 and 35 gigawatts of solar energy will need to be deployed by 2050. Two statewide studies on the technical potential and siting of solar are underway. You don't need to wait to get started though – the *Community Planning for Solar* toolkit offers a 6-step process for proactive and inclusive community planning for the siting and financing of solar to optimize local benefits and minimize conflicts.

- **Speakers:** *Zara Dowling*, Ph.D., Research Fellow, UMass Clean Energy Extension; *E. Heidi Ricci*, Director of Policy and Advocacy, Mass Audubon
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## 12:30 p.m. – 1:45 p.m. Lunch – Networking

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## 1:45 p.m. – 3:15 p.m. Afternoon Session

### 13. Introduction to the Zoning Act (MIIA)

This course addresses the purposes of the Zoning Act and the process (and the Planning Board's role) for the adoption/amending of zoning bylaws and ordinances. The difference between variances and special



permits will be discussed. Additionally, the course will include how zoning is enforced and by whom as well as the role of the Zoning Board of Appeals in variances and zoning appeals.

- **Speaker: *Brian A. Currie, AICP, Consultant***

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#### **14. Zoning Pitfalls and Pratfalls: What NOT to do! (MIIA)**

Drafting zoning by-laws and ordinances for your community is becoming ever more complicated; in addition to legal issues, many zoning regulations suffer from practical and wordsmithing woes. What mine fields should you avoid? We will review common pitfalls to avoid, and share stories of some of our zoning pratfalls over the years.

- **Speakers: *Barbara J. Saint André, esq., Director, Community and Economic Development, Town of Medway; Judi Barrett, Principal, Barrett Planning Group LLC***

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#### **15. Rethinking the Retail Strip**

The Metropolitan Area Planning Council conducted a detailed analysis showing that the Greater Boston region has thousands of acres – more than 13.7 square miles – of strip malls and similar commercial properties. Many of these are underutilized, underperforming, or obsolete. If the top 10 percent of sites in each municipality were retrofitted to new mixed-use development – an average of fewer than four sites per community – it could create 125,000 housing units while adding or maintaining thousands of square feet of commercial or flex space, generating an estimated \$481 million increase in net tax revenue for the host municipalities. It is hoped that this session will spur community conversations about future growth and to support policymakers and state agencies who will play an important role in strip mall reuse.

- **Speaker: *Tim Reardon, Data Services Director, Metropolitan Area Planning Council***

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#### **16. How to Make Micromobility Part of Your Town's Transportation Options**

This session will provide planning directors and planning board members with an overview of micromobility, the regulatory framework, and how to make the most of non-auto transportation modes to support downtowns and revitalization efforts and healthy living. Topics to be covered include: what is

micromobility and why is it a good thing?; regulatory environment; what do cities and towns need to do to support micromobility?; and a discussion of lessons learned.

- **Speakers:** *Leonardi Aray, AIA, Leonardi Aray Architects; Craig Kelley, Attorney and Principal, Urban Core Strategies; Juliet Walker, AICP, Community Planner; Ben Carlson, AIA LEED AP, Director of Urban Design, CHPlanning*
- **Moderator:** *Mark Favermann, Founder/Principal, Favermann Design*
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## 17. From Plan to Implementation – How to Turn the Vision into Reality

Completing a plan of any size or scale is only the first step for most planners and residents in a community. The hard work usually begins after the plan is in place and implementation begins. This session will share experiences in building the plan and consensus, prioritizing implementation, and actioning recommendations to turn vision into reality.

- **Speakers:** *Maren Toohill, AICP, Town Planner, Town of Littleton, CPTC Board member; Eric Halvorsen, AICP, Principal, RKG Associates*
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## Conference Policies

- The 2023 CPTC Annual Conference is an in-person event. Workshops will not be recorded.
- Continental breakfast and buffet lunch are included. Please contact [coordinator@masscptc.org](mailto:coordinator@masscptc.org) with any dietary restrictions.
- Payment is available by check or credit card (cc available online at the time of registration only). Checks can arrive after the registration deadline. Please make checks payable to CPTC and mail to: Citizen Planner Training Collaborative (CPTC), c/o Urban Harbors Institute, University of Massachusetts Boston, 100 Morrissey Boulevard, Boston, MA 02125.
- **Cancellation Policy:** Registering for the conference is a commitment to attend. Payment is required unless a written cancellation request is received by the CPTC Coordinator at [coordinator@masscptc.org](mailto:coordinator@masscptc.org) by Tuesday, March 14, 2023 at 5:00 p.m. EDT. No refunds will be processed after March 14, 2023.
- Please contact [coordinator@masscptc.org](mailto:coordinator@masscptc.org) with any questions.

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