



## ANNUAL REPORT

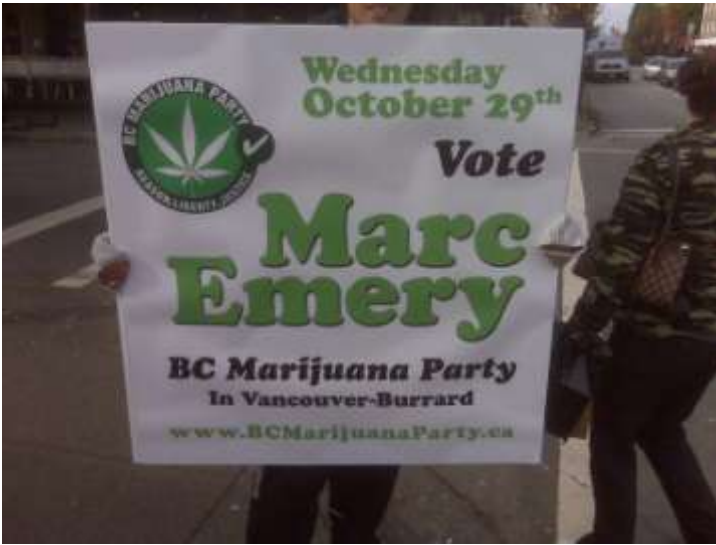
*October 1<sup>st</sup>, 2007 – September  
30<sup>th</sup>, 2008*

### **President's Message:**

The Chapter's major accomplishments of the year included creating a robust certification maintenance training program for our members as well as our ongoing collaboration with other organizations. The requirements for certification maintenance became mandatory at the National Conference in 2007 and the Massachusetts Chapter wasted no time in bringing on line a program that included co-sponsorship opportunities, webinars, a CD-ROM library and integration into practically every event possible. The membership of the Massachusetts Association of Planning Directors voted to formally affiliate with the Chapter which has allowed for an even stronger relationship with MAPD. Through MAPD's monthly luncheons and annual conference, the Chapter has been able to provide additional opportunities for certification maintenance. The Chapter entered its fourth year of collaboration with the Citizens Planner Training Collaborative and the

Massachusetts Association of Planning Directors to share an administrative assistant, Chris Skelly. Chris' excellent work allows the Chapter board to continue to focus on policy issues rather than the day to management of chapter affairs; so that we can more effectively serve our membership. Wentworth Institute of Technology provides our website services, which has served as an extremely effective means of communicating with members. The Chapter continued to promote reform of our outmoded land use statutes by serving on the Massachusetts Zoning Reform Working Group and the Zoning Reform Task Force that was created by Undersecretary Greg Bialecki. The Zoning Reform Working Group's Community Planning Act has served as a catalyst to bring both the regulators and the regulated together at the Zoning Reform Task Force. The Planning White Paper, while receiving little fanfare or attention, continues to serve as a working document for advancing Massachusetts planning concerns. The White Paper, which is available on our web site, was the result of collaboration between the Massachusetts Association of Regional Planning Agencies, the Mass Smart Growth Alliance, the Massachusetts Association of Consulting Planners, the





Massachusetts Association of Planning Directors and the Chapter. Undersecretary Bialecki continues to meet on a quarterly basis with the contributing associations to make sure that we are proceeding on the stated goals.

At the 2007 Southern New England Annual Conference which was held in Hyannis, Massachusetts in October 2007 the membership voted in a new slate of officers, including Felipe Schwarz, Vice President for Chapter Affairs, Marc Rouseau, Vice President for Professional Development, Anthony Fields, Vice President for Legislative Affairs, Mary McCrann, Secretary, Chris Kluchman, Treasurer, and Steve Sadwick, President. We are fortunate that a number of existing board members have remained on the board and we are forever grateful for the past and ongoing commitment of our immediate past President, Peter Lowitt. The 2007 Annual Conference as an outstanding success, breaking attendance records as well as fundraising records. Thanks to Mary McCrann and Felipe Schwarz, and the many dedicated people who helped to organize the event in 2007. It was a great tribute to the strength of the Massachusetts Chapter.

The 2008 Southern New England Annual Conference was held in Providence, Rhode Island and was very successful. Again, Felipe

Schwarz and Mary McCrann did an outstanding job. It should be noted that the Chapter has received Mary's resignation effective the end of September 2008 as she and her husband head back to Maine. The Chapter is extremely thankful for Mary's service in working on these conferences, as well as the time she served as Chapter Secretary.

At the 2008 National Planning Conference in Las Vegas, over 80 planners from Massachusetts attended. The Chapter was well represented at the National Policy Assembly which acted on APA's Draft Policy on Climate Change. The Massachusetts delegation brought forth a number of changes that were adopted by the Assembly as well as the APA National Board of Directors. Two Massachusetts members, Ronald Lee Fleming and Wayne Feiden, were inducted into the Fellows Program of the American Institute of Certified Planners. They are to be congratulated for the recognition of outstanding careers in planning. Representative John Olver of Massachusetts was awarded APA's 2008 Outstanding Legislator of the Year at the annual National Awards Luncheon.

It should also be noted that the City of Northampton was one of the first of 10 communities awarded through APA's Great Places designation in 2007. In 2008, the City of Salem and Washington Street in Boston were recognized under the Great Places program.



The Chapter was very busy in 2007- 2008 as this partial list of events illustrates:

- Co-sponsored with Massachusetts Association of Realtors, 2 regional workshops “Planting Seeds of Smart Growth” in the Fall 2007.
- Chapter was a co-sponsor and administrator of the State of Massachusetts Smart Growth/ Smart Energy Conference held at the DCU Center in Worcester in December 7, 2007.
- Annual Awards and Holiday luncheon in Lawrence on December 14, 2007.
- Cosponsored with the US EPA, LEED for Neighborhood Development in January 2008.
- Cosponsored 7<sup>th</sup> Annual Regional Sustainable Development Forum with New Ecology, Inc. in January 2008.
- Cosponsored Integrating Public Health and Planning Forum in January 2008.
- Held our annual retreat to develop the chapter work plan and goals at **Wentworth Institute of Technology's** Center for Community and Learning Partnerships on February 1, 2008.
- The Board welcomed Mass Association of Planning Directors vote to formally affiliate with the Chapter.
- The chapter is a member of the Massachusetts Infrastructure Investment Coalition and regularly votes to endorse their publications on the state of various infrastructure, including Massachusetts Wastewater Facilities and Massachusetts Drinking Water.
- Co-Sponsored Economic Development Conferences with MEDA and NEDA through our Economic Development Committee
- Chapter co-sponsored and members actively participated in the March 2008 Citizen Planner Training Collaborative Annual Conference at Holy Cross in

Worcester.

- Co-sponsored Housing Institute June 12, 13, 2008 with DHCD, CHAPA and MHP.
- Signed on as Greenbuild Partner 2008 with Iram Farooq representing the Chapter.
- Participated in National Planning Month October, 2007.
- 2007 Southern New England Planning Conference in Hyannis broke attendance and fundraising records.
- Chapter participated in the National **Delegate Assembly** which past APA's Policy Guide on Planning and Climate Change.

The Chapter Board has done an outstanding job in serving the members of the Chapter. Our presence at the National APA level **includes: Peter Lowitt, Chapter President's** Council Treasurer and Jenny Raitt as head of the Housing and Community Development Division. The Board will continue to work on behalf of the Chapter and its members and we encourage members to contact us and get involved in Chapter affairs. You will find it to be truly rewarding. The Chapter has members that in leadership position with the **National APA's divisions and networks.**

Looking Ahead:

The Massachusetts chapter needs to remain focused on land use reform. All members are strongly encouraged to stay tuned with the proposed changes to both the Zoning Act and the Subdivision Control Act. At the end of the last legislative session, there were a number of green community bills that were enacted and that will demand the attention of the planning community. We should also remain focused on budgetary issues that will play out of the course of the next year and the impacts that it will have on planning.

There is a strong emphasis from APA National to encourage young planners to engage in the APA. We as a chapter need to make the commitment to bringing young planners to our training opportunities and events. These planners will be shaping the future of the organization.

Within the next year, the Chapter will start preliminary discussions about the 2011 National Planning Conference in Boston. This will be a major event for the Chapter to showcase our achievements to the Nation. Please be prepared for your opportunity to volunteer.

The membership is encouraged to contact the Board with concerns, comments, or an interest to volunteer at any level of commitment. We, as volunteers, strive to provide the best service possible to the membership.

What follows in this annual report are the individual reports of the Chapter Board members.

It has been a privilege to represent the planners of the Commonwealth this past year.

Respectfully submitted:

Steven J.  
Sadwick, AICP

Chapter  
President



## Professional Development:

This is my initial Annual Report as Professional Development Officer. It has been quite a year with many lessons learned. The new AICP Certification Maintenance Program, officially unveiled in October 2007, consumed a great deal of time and effort. There were many logistical issues with the new system that was implemented by National APA. Over a period of four months, these issues were resolved, in part, with the input of myself and other PDO Officers. A list of PDO actions taken during the reporting period of October 1, 2007 through September 30, 2008 follow.

- Maintained presence on the Massachusetts American Planning Association web site / blog. Topics included: AICP Certification Maintenance, AICP Exam, PDO Report, Registering Courses
- Submitted numerous activities for AICP Certification Maintenance approval including conferences ( e.g. MAPD; Smart Growth ), seminars and workshops. This included Massachusetts Association of Planning Director's Luncheons and going back to 2007 activities to obtain CM approval.
- Worked with The Ohio State University to make available to Massachusetts American Planning Association / AICP candidates an AICP Training Webinar.
- Maintained contact with National APA ( i.e. PDO Reports ) to be informed and be able to share relevant information with membership
- Worked with PDO's in Connecticut and Rhode Island to prepare for the Southern New England American Planning Association Conference in Providence, Rhode Island ( September 2008 )

- Attended National American Planning Association Conference in Las Vegas, Nevada ( April 2008 ) and participated in PDO activities
- Worked with potential Certification Maintenance providers ( e.g. professional associations; engineering firms ).
- Assisted planners to become AICP Certified. Provided study recommendations. Sold training CD.
- Made preparations for Tufts University / AICP Exam Seminars ( 4 sessions ). Note: canceled due to lack of registrants.

The Chapter is pleased to announce that 18 Massachusetts planners passed the AICP certification exam during this reporting period.

- Assistance to planners to become certified, including study recommendations and reduced fee scholarship awards for the exam.
- With the introduction of Certification Maintenance in April, 2007, the position of



Professional Development Officer increased in importance. The Board voted to establish a committee to work with the PDO in grappling with the issues which will come up as CM rolls out. To facilitate this effort the Board voted to allocate a portion of the savings which will accrue to the chapter from the move to an electronic newsletter format to support professional development programs for the entire chapter.

- Continued management of the Citizen Planner Training Collaborative bank account;
- Continued coordination with Shared Administrative Staff and coordination with MAPD and CPTC for reimbursement and revised MOU regarding the Shared Staff position;
- Work with Administrative Assistant Chris Skelly to handle receipts, payments and reporting related to the following events:
  - ✓ 2007 Southern New England Planning Conference in Hyannis
  - ✓ 2007 CPTC Fall Training Workshops
  - ✓ 2007 Smart Growth Conference
  - ✓ 2008 Spring CPTC Training
  - ✓ 2008 LEED ND event in Boston (for US EPA)

Respectfully submitted, APA Massachusetts Professional Development Officer Marc R. Rousseau, AICP

**Treasurer’s Report:**

The past Fiscal year (July 1, 2007 to June 30, 2008) included the following milestones:

- Once again, we doubled the amount of funds going through the organization, due to fiscal management of the 2007 Southern New England APA conference in Hyannis, the 2007 Smart Growth conference, and the LEED Neighborhood Development event. The following graph shows the amount of income coming into the chapter over the last 3 years. This increase in revenue was accompanied by a parallel increase in expenses, so our “money in hand” remains consistent.



- Coordinated with APA National staff to respond to their request for standardized financial information

Development Officer (Marc Rousseau) to track the CM program

- Worked with Professional

- Filed tax returns for FY 2006 and wrote letter to IRS requesting abatement of late filing penalty fees

*Goals for the Next Fiscal Year*

- Do a better job relating the quarterly and

annual financial information to the Board's annual work program and budget.

*Respectfully submitted, APA Massachusetts Chapter Treasurer Chris Kluchman, AICP*

### **Secretary's Report: Mary McCrann**

In addition to taking meeting minutes, the Secretary has been working with the web master for posting them on the chapter's website. The Secretary has also maintained up-to-date versions of the Board Members, Student Representatives and By-laws. It has been a pleasure to serve on the MA-APA Board.



*Respectfully submitted, APA Massachusetts Chapter Secretary Mary McCrann*

### **2007 Chapter Awards:**

William Roth, AICP, took over the job of emcee and Awards Chair from Thomas Bott, AICP who faithfully served the chapter for a number of years in this position. The 2007 Chapter Awards presented at the Annual Holiday Luncheon December 2007 are as follows: Outstanding Planning Award for Comprehensive Planning to the Town of Wellesley for the 2007-2017 Update, 2 Planning Awards for a Planning Project where distributed as the committee chose to awarded Kingston and Belmont for their 40R

Bylaw and Design Standards. Kathleen Bartolini was recognized by MAPD for her long service to the association. Mr. Walter B. Power, III, Chairman Emeritus, Salem Planning Board received the Citizen Planner of the Year Award. Mr. Power has served the Salem Planning Board for over 30 years. As Chairman, he served with six Mayors', seven City Planners and countless planning staff.

Dwight Merriam made the special trip up from Connecticut to award Mr. James Miller, the Charles Downe Planning Award. This a distinguished award that is given out on rare occasion by the Trustees of the Downe Award.

### **Citizen Planner Training Collaborative 2007-08**

**Our first distance learning "webinar"** - The first CPTC web-based interactive distance learning "webinar" was held in November 2007. Over 50 people took part in the program, presented by the imitable Bob Ritchie and transmitted statewide in real time from Wentworth Institute of Technology in Boston. Special thanks to CPTC Board member Sean Bender and Austin Lauria at the Wentworth Institute Center for Community Partnerships for organizing the event.

The distance learning model means that users can get training without having to get to a training site. This is a real convenience for our rural users and persons on the Cape and Islands. Our user surveys indicate that participants were pleased with the webinar—and they've said they want more! We will be offering two webinars in Fall 08.

2008 American Planning Conference Presentation -Las Vegas - Board member Elaine Wijnja, (from the Department of Housing and Community Development), and I attended the American Planning Associations' 100<sup>th</sup> anniversary National Planning Conference in Las Vegas. We were part of a panel presentation discussing ways to provide training to Planning Boards and Zoning Boards of Appeals. Our presentation highlighted the successful way that CPTC collaborates with a range of organizations statewide to fulfill our training mission.

New User Survey Project - In June 2008, an in-depth survey was mailed to over 600 members of Planning Boards and Zoning Boards of Appeals in Massachusetts. The survey results will give us detailed information about our audience. The information will be used to help us provide the type of trainings that are most needed, delivered in ways that are convenient and accessible.



*Respectfully submitted, APA  
Massachusetts Chapter CPTC Liaison, Sean  
Bender*

### Web Page:

The Chapter website has been operating for two years. We benefited greatly from our association with Wentworth Institute of Technology who continues to maintain the technical side of the website. Austin Lauria, the student leader who designed the website and worked out the bugs has graduated, but continues to volunteer his time assisting the students that chapter board member Sean

Bender has assigned to the project. The membership is encouraged to regularly visit the website at [www.massapa.org](http://www.massapa.org).

### Newsletter:

As of September 2007, the MA/RI newsletter has been web-based, available to all on [www.massapa.org](http://www.massapa.org) and sent to all APA members via e-mail. The format has changed to HTML since the print version ended. The newsletter editor and website maintainers from the Wentworth Institute of Technology have been working together closely to enhance article features, announcements, job listings, RFPs, and advertiser links. The website enhancements are continuing to improve and have included free job postings without requiring signing in, and will include posting of graphics in the future. Featured newsletter topics over the past year have included AICP Certification Maintenance, transportation, smart growth, climate change, and local planning projects in Massachusetts and Rhode Island. In the future, the newsletter will



be poised to promote member blogs and announcements of local and national

relevance."

Respectfully submitted,

*Sabine Prather*

## COMMITTEES

### *Economic Development Committee*

Jef Faser, from VHB heads the Economic Development Committee. The APA-MA Economic Development Committee worked with the Massachusetts Economic Development Council (MEDC) to co-sponsor a seminar on Tax Credits and Incentives as part of an annual NEDA/MEDC Advanced Seminar. This seminar was held on October 18, 2007 at the Gateway Park in Worcester. The program consisted of a morning and afternoon session as well as a luncheon speaker. The morning session focused on historic tax credits, and tax increment financing and special assessments. The afternoon program focused on new market tax credits. Speakers included Albert Rex of MacRostie Historic Advisors, Kathy McCabe of McCabe Enterprises, Bob Ibanez of the U.S. Department of the Treasury, Eric Darling of Carlisle Tax Credit Advisors and Jon Mahoney, Industrial Director for Life Sciences, Commonwealth of Massachusetts.

The Economic Development Committee is working with MEDC to plan another event for the upcoming year.

### *Community Development & Housing*



### *Committee*

The Community Development & Housing Committee chaired by Jennifer Raitt, also APA's Housing and Community Development Division Chair, participated in a number of activities on behalf of the Chapter. The Committee reviewed and prepared a Comment Letter regarding the Proposed Regulations 760 CMR 56.00—Comprehensive Permit: Low or Moderate Income Housing to ensure alignment with the APA's Housing Policy Guide goals. The Committee was also represented at Citizens' Housing and Planning Association's Land Use and Planning Committee. Finally, the committee participated in the 2008 Southern New England Planning Conference by assisting in developing the Affordable Housing that Fits session.

### *Sustainable Development Committee*

The Sustainable Development Committee, together with the U. S. Environmental Protection Agency, the New England Chapter of the Congress for New Urbanism and The Green Roundtable, organized a one-day workshop on the LEED-Neighborhood development program. This workshop presented an overview of the LEED-ND program. It also presented case studies using both city examples and suburban examples of LEED-ND pilot projects throughout New England. These projects included Massachusetts developments such as Westwood Station, Jackson Square in Boston, Waterfront Square in Revere and Southfield in Weymouth.

The program was attended by over 200 planners, architects developers and others. It was held at Suffolk University Law School in Boston.

*Respectfully submitted, APA Massachusetts Sustainable Development Committee Chair, Robert Mitchell, FAICP*

### Amicus Committee

Ralph Willmer, AICP (Vaness Hangen Brustlin), Peter Lowitt, AICP (Devens Enterprise Commission), Tom Broadrick, AICP (Town of Barnstable), and Edith Netter, Esq. (Edith Netter & Associates) comprise the Amicus Committee. The Bjorklund v. ZBA of Norwell case was finally decided in favor of the Town of Norwell and was a case that the Committee filed an Amicus brief in support of Norwell ZBA supporting the right of the ZBA to limit the size of a nonconforming rebuild.

Transportation Committee- No report filed.



### Legislation:

The Chapter remained engaged in the land use reform efforts this year. Peter Lowitt and Steve Sadwick have been



most actively engaged in the Administration's Task Force on Planning and Zoning Reform. Steve Sadwick continued to serve on the Zoning Reform Working Group with a number of Chapter members, including Jim O'Connell and Jeff Lacy. It is expected that a version of the Task Force's Land Use Partnership Act will be introduced in the next legislative session.

The Chapter provided testimony during the Comprehensive Permits regulation hearings. The Chapter also provided comments on an eminent domain bill that did not pass this session. We should remain vigilant in watching for an eminent domain bill that achieves a balanced approach to this issue. Anthony Fields is the Chapter's Legislation and Policy Officer.

## THE REGIONS OF APA-MA

Central Region: Kathy Joubert

The central region worked with the Central Massachusetts Regional Planning Commission



This coming November 19<sup>th</sup>, the Northeast Region of the APA has partnered with the Essex County Forum and will co-host a Permitting Best Practices Workshop at the Georgetown Peabody Library (7pm-9pm). During our discussion we will explore streamlined permitting, Chapter 43D and hear case studies from three communities.

Looking ahead, the Northeast Region also plans to host a "101" seminar of Form Based Codes. This event has yet to be scheduled but will be posted on the APA website once details become finalized.

Cape and Islands: No report filed.

to co-sponsor a series of audio/web conferences through the APA. This monthly series will continue to June 2009. Topics include: Mastering Density; Renewable Local Energy; Creating Successful Meetings; Introduction to the Zoning Board of Adjustment; Infrastructure, CIP, and Alternative Transportation; Informed Decisions; A Guide to Gathering Facts and Evidence; Designing for Water Conservation; Zoning for Transit-Oriented Development; Inclusionary Housing; Great Plans, Great Communities; and 2009 Planning Law Review.

Boston Region: No report filed.

Western Region: No report filed.

Southeast Region: No report filed.

Northeast Region: Paul Materrazo is the new Northeast Regional Representative. Over the past year, the Northeast Region of the APA has assisted in helping organize the Massachusetts Association of Realtors Smart Growth Conference held at Umass Lowell in October 2007. In March of 2008, the Northeast Region, in collaboration with the Merrimack Valley Planning Commission, hosted a webinar on Village Center Planning. Both events were well attended and provided participants in-depth knowledge on various smart growth techniques.

