



September 28, 2020

TO: Christopher Ryan, Director of Community and Economic Development, Town of Harvard, MA

FROM: Marta Goldsmith, Director, Form-Based Codes Institute

RE: Response to RFI for the Ayer Road Corridor Vision Plan and Form-Based Code

Smart Growth America is extremely interested in working with the Town of Harvard on this project. We believe that we have the experience and skills to successfully undertake all of the tasks outlined in the RFI and work with the Town to create a strong Vision Plan for the community, conduct the market and fiscal analysis, and draft a form-based code for the Ayer Road Corridor. Attached, for your information, is a summary of our qualifications and experience and staff bios for the key members of the project.

However, as explained in the pre-submission conference call, the RFP, if issued, will be open to any applicants, regardless of whether they submitted a response to the RFI. You also explained in a follow-up email that all responses to the RFI would be posted on your website and available to the public, as well as other potential respondents to the RFI.

Because of these two conditions, we have decided that we are not comfortable outlining our specific approach to this project, which would be available to any other applicant. We look forward to seeing the RFP when it is released and to responding, in full, to the request.

We would be happy to discuss this with you, should you like further explanation.

Smart Growth America Qualifications and Experience For Ayer Road Corridor Vision Plan and Form-Based Code

For the past two decades, Smart Growth America (SGA) has worked with diverse communities in all 50 states to create places that are safe, healthy, prosperous, and resilient. We provide advice and support on creating community visions, economic development, and regulatory and policy reform to help communities thrive and achieve more successful, equitable development

Localities across the country draw on SGA's experience and expertise to analyze data to build a common foundation of understanding of current conditions and potential growth; facilitate discussions to identify local goals, challenges, and opportunities; draw upon best practices from other communities; and synthesize all of these to recommend a path forward, often with SGA's continued support. SGA provides technical and policy analysis directly to communities to help them pursue their goals and initiatives.

This project would draw upon four of SGA's programs to meet the goals of the project—the National Complete Streets Coalition (NCSC), the Economic Development Team (EDT), the Form-Based Codes Institute (FBCI), and LOCUS, SGA's real estate developers and investors program. Together, these four teams have worked extensively with municipalities of all sizes to conduct market and fiscal impact analyses, create vision plans through community engagement, and identify zoning tools for communities to achieve their development preferences and priorities.

Charlotte, North Carolina Transit-Oriented Development (TOD)

The SGA EDT helped the City of Charlotte strategize a catalytic development strategy along the Gold Line—with a specific focus on station areas in the Historic West End (HWE), while enabling the city to preserve established neighborhoods and minimize displacement. The assignment posed two major questions: 1) What are the opportunities for TOD in the HWE with the introduction of the Gold Line? and, 2) If the prospects for TOD in the HWE are realized, what are the risks of displacement for residents of low- and moderate-incomes, and how can those be minimized?

SGA followed three strategies to address these questions: 1) A policy and regulatory analysis to understand how zoning and land use regulations impact development possibilities in the HWE, and how they might affect the potential for equitable transit-oriented development; 2) Scenario planning to identify opportunities for development in the

HWE, and; 3) A real estate market and housing assessment to identify the scope of potential displacement and loss of affordable housing. These three strategies included a highly collaborative process, receiving feedback and input from key stakeholders in Charlotte throughout the engagement. Included in the deliverables were a set of scenarios and massing studies.

The SGA team found that current policies and regulations put restrictions on development in the Historic West End Streetcar corridor that are not present in the LYNX Blue Line Light Rail corridors. If transit-oriented development is desired for the Historic West End, some regulatory modification is necessary. SGA advised that planning and development processes and regulations for station areas along the Gold Line should be comparable (not necessarily identical) to those for station areas along the LYNX Blue Line light rail.

Massachusetts Opportunity Zones Academy

In 2019, SGA conducted the first-ever Massachusetts Opportunity Zones Academy. SGA staff and its LOCUS coalition of responsible real estate developers and investors worked with the representatives from Barnstable, Fitchburg, Greenfield, Montague, Salem, and Yarmouth, Massachusetts on a three-part technical assistance program focusing on the role of Opportunity Zones and Opportunity Funds in stimulating investment in traditionally underserved census tracts. LOCUS' technical assistance team worked to equip participating communities with the tools, skills, and knowledge necessary for developing sustainable growth and development strategies that balanced their demand for walkability with the need for jobs, housing, open space, and transportation that is attainable and accessible to all.

Fitchburg

The SGA EDT conducted a site suitability analysis for Fitchburg, MA with the goals of pursuing additional density, revitalization of existing buildings, engaging private sector property owners, and improving pedestrian friendliness. The project included a hotspot analysis and allowed SGA to overlay clustered higher property values, community assets, recent investments, and vacant land and buildings. From there, 92 parcels were identified in four key nodes.

The SGA team held a workshop with key stakeholders in the City that led to the preparation of an Investor Prospectus for Fitchburg's Opportunity Zones. The Prospectus presents five shovel-ready projects in Fitchburg. SGA also worked with the City to host a Fitchburg Link-Up event, which featured a walking tour to showcase the five projects included in the prospectus, along with other key features within the community.

Salem

SGA EDT worked with the City of Salem, Massachusetts to conduct a fiscal impact analysis to model the ways in which an underutilized plot of land adjacent to a proposed commuter rail station could be developed into a smart growth hub under existing and proposed land use, zoning, and regulatory frameworks. SGA modeled three different development scenarios for the area, demonstrating how increases in density and changes in uses affect the fiscal return of the development and contribution to the local tax base. Along with these scenarios, SGA provided a massing study to provide visual examples of what each scenario would look like.

Barnstable and Yarmouth

FBCI was the project lead for two communities in the Mass OZ Academy—Barnstable (Hyannis) and Yarmouth—interested in creating community-backed visions for select catalytic development sites within their downtown commercial corridors. As part of this project, FBCI led community workshops to create high-level conceptual visions for each town’s catalytic development sites that reflected the preferences of each community.

For example, in Yarmouth, the visioning session revealed a need and potential solution to expand wastewater treatment capacity to meet development pressures. Many local developers and investors expressed frustration with this infrastructure gap as an obstacle to future residential, commercial, and mixed-use projects in town. As part of a plan to overcome this barrier and achieve the town’s vision, SGA proposed a District Improvement Financing (DIF) plan as a solution to the problem facing the wastewater system. Under the terms of the DIF, a public or public-private entity would issue bonds to pay for a wastewater treatment facility in the town. The tax increment which would result from an increase in surrounding property values would be earmarked to pay for the infrastructure project’s debt service.

Leesburg, Virginia

FBCI brings a wealth of experience and knowledge to help communities update and revised their land use regulations to promote better placemaking and create more walkable, mixed-use, equitable development.

Last year, FBCI partnered with urban design and town planning firm Ferrell Madden to conduct an audit of an existing code for Leesburg, Virginia’s Crescent Design District (CDD), an auto-centric district adjacent to the historic downtown. Although the CDD was

identified as a form-based code, it was not delivering the walkable, mixed-use, high-quality public realm that the code was intended to provide. FBCI conducted stakeholder interviews, prepared and presented findings and recommendations to the Town Council, and prepared the final report, which included a detailed audit of the existing code and recommendations for changes to make the code more effective in achieving the develop goals of a more walkable, mixed-use, human-scale urban fabric that compliments the adjacent historic town center.

Based on stakeholder interviews and an in-depth code analysis, the project team identified four overarching issues with the CDD form-based code as follows:

- The CDD was almost impossible for developers to use and difficult for staff to administer.
- The district was divided into too many use-based subareas with minimal differences in the kind of development the code was intended to foster.
- The regulations in the code are confusing, contradictory, and/or burdensome.
- Many of the regulations are suburban in nature and not consistent with the intent of the code.

In addition to detailed proposed code revisions, the project team proposed four threshold questions to the Town Council to trigger a comprehensive approach to improving the CDD. The FBCI team met with the Town Council and recommended that they address these questions before moving forward and explained their options for moving forward, depending on their responses. The threshold questions were:

1. Does the Town Council support the original stated purpose and goals of the CDD?
2. Should the use requirements/zones in the CDD be simplified, placing more emphasis on urban form?
3. What is the optimum level of legislative review for proposed development projects;
4. Is the Council willing to make public funds available to support improvements to the public realm; and
5. How should architectural standards be addressed in the CDD.

As a result of FBCI/Ferrell Madden's recommendations, the Town is moving forward with updating their comprehensive plan, conducting a market study of the area, and substantially rewriting the Crescent Design District code.

Durham, North Carolina

Through direct technical assistance, NCSC works closely with communities to help them clearly articulate their visions for safer, prosperous, and resilient places; identify barriers in policy and practice that stand in the way of that vision; and refine and share that vision with the community through inclusive engagement strategies.

In Durham, North Carolina, NCSC worked closely with a local cross-disciplinary team to reimagine West Club Boulevard, an arterial road that divides residential communities and major public transit stations from a near-defunct shopping mall slated for mixed-use redevelopment. NCSC conducted a site visit with staff then facilitated stakeholder discussions about existing conditions as well as existing policy limitations that reinforce those conditions. Through hands-on exercises and skill-based learning, NCSC helped Durham staff to reimagine the corridor and plan a robust community engagement effort to reach a variety of audiences that move to and through the site. Durham ultimately implemented and evaluated a temporary demonstration project with direct support from NCSC, and the city has since taken the skills and practices learned through NCSC technical assistance to pursue permanent corridor improvements.

SGA is prepared to work with the Town of Harvard to build a prosperous and resilient Ayer Road Corridor Vision Plan, conduct the market and fiscal analysis to guide effective change and recommend changes in zoning and other land use policies to help the community achieve the vision they create. Our diverse and complimentary experience and successes supporting local governments through technical assistance will help the town become economically successful, grow its revenue stream, and become an exemplary Smart Growth district in Massachusetts.

SGA Staff Bios

Marta Goldsmith is the Director of the Form-Based Codes Institute where she oversees all programming, including technical assistance, educational offerings, and the Driehaus Award for Form Based Codes. Prior to joining Smart Growth America, Marta was Senior Vice President and Chief Operating Officer at LRG, Inc., a public affairs and nonprofit management firm. She has served as Senior Adviser to the Commissioner of the Public Buildings Service, GSA and Chief Operating Officer of the Institute for Transportation and Development Policy (ITDP). Prior to her tenure at ITDP, Marta worked at the Urban Land Institute, where she was responsible for a wide range of programs, including land use policy research and publications, advisory services, community outreach, and international programs. Marta has served as Executive Director of the Southern Governors Association and as Special Assistant to the Governor of Florida where she covered community and economic development, housing, and transportation issues in the Florida-Washington Office. She has taught planning courses at the University of Virginia and was selected as a W.K. Kellogg National Leadership Fellow. Marta earned her master's degree in City Planning from Harvard University and a BSc in Sociology from Indiana University.

Chris Zimmerman is Vice President for Economic Development. An economist by training, Chris heads SGA's team which provides quantitative analysis for data-driven policy recommendations, such as modeling the fiscal impact of development patterns, or quantifying potential loss of affordable housing from rising real estate values. He developed SGA's Technical Assistance program for equitable Transit-Oriented Development (eTOD), as well as the downtown revitalization program which provides training and technical assistance to local officials. Prior to joining SGA, Chris was intimately involved in planning, development, housing, and transportation policy for an urban municipality widely recognized as one of the leading models for smart growth and TOD in the U.S., through his work as an elected official in Arlington County, Virginia. During his 18 years as a member of the Arlington County Board (1998-2014), Chris served as Arlington's principal regional transportation representative, participating as both member and chair of most of the regional transportation bodies that serve Northern Virginia and the greater Washington area.

Jeri Mintzer is the Deputy Director on the Economic Development Team, overseeing its programs and operation. She previously managed the Governors' Institute on Community Design, working with over 20 state agencies and governors' cabinets to deliver workshops on smart growth principles, transportation reform, economic development, and more. She has worked on advocacy campaigns, communications, grant management, and the National Sustainable Communities Learning Network.

Jordan Howard is an Economic Development Specialist for SGA's economic development team. He provides technical assistance, advocacy, and quantitative analysis for projects relating to economic & fiscal health, transit-oriented development, land use and transportation interactions, and market analysis. Prior to joining SGA, he served as a real estate analyst for Novogradac and

Company, LLP where he completed various market studies and analysis for multifamily developments utilizing the Low-Income Housing Tax Credit (LIHTC). He received his Master's in City and Regional Planning from the Georgia Institute of Technology in Atlanta. Mr. Howard graduated from the College of Charleston with a degree in Political Science.

Becca Buthe is a Research Analyst for SGA's economic development team. She conducts quantitative and spatial analysis using R and GIS and provides technical assistance for projects relating to economic development, land use, and transportation. Prior to joining SGA, she worked as a researcher for an international humanitarian organization in the Middle East. During this time, she worked to address challenges facing various refugee and internally displaced populations. Ms. Buthe holds a bachelor's degree in Civil Engineering from Rice University and a master's degree in Urban and Regional Planning from the University of Colorado Denver.

Tola Myczkowska is the Program Manager for SGA's Land Use and Development Team. In her current role, she manages the team's technical assistance and Opportunity Zones programs, as well as other real estate policy, advocacy, and research projects. Prior to joining LOCUS at SGA, Tola worked on transportation security at the Port Authority of New York and New Jersey. She has also worked as an international anti-poverty advocate and refugee resettlement coordinator. Tola holds a Bachelors in Urban and Regional Studies and International Relations from Cornell University.

Cole Zaccaro is the Program Manager for the National Complete Streets Coalition. They perform quantitative, qualitative, and spatial analysis to support the Coalition's reports and resources. They also coordinate the Coalition's ongoing technical assistance programs and co-author articles, case studies, and toolkits. Prior to joining Smart Growth America, Cole conducted research on health-related behaviors in New York City and Brazil. They hold a Master of Science in City Design & Social Science from the London School of Economics & Political Science and a Bachelor of Science in International Health from Georgetown University.

Emily Schweninger is the Deputy Director of Thriving Communities, a program of Smart Growth America. A public health professional with over 12 years of experience, Emily began her career in New Orleans, working in disaster response and recovery after Hurricane Katrina. There she conducted research on human rights abuses among migrant laborers, supported peer education programs to increase healthcare access for immigrant communities, and served as the Director of Research and Evaluation at Market Umbrella, a nonprofit dedicated to local food system development. After leaving New Orleans, Emily worked in global health, conducting research in the Andean Region, coordinating a CDC project in Mozambique with Global Health Communication, and lastly managing UNICEF's HIV portfolio in Equatorial Guinea. With diverse experiences and skills, from coordinating multi-sectorial programs to managing communication campaigns, Emily has returned to the United States to focus on building strong, resilient communities by promoting health equity through the built environment. She holds a Bachelor of Arts from the University of

North Carolina at Chapel Hill and a Master of Public Health from Tulane University's School of Public Health and Tropical Medicine.

Christopher Coes is the Vice President of Land Use and Development at Smart Growth America. Under his leadership, he oversees Smart Growth America's real estate programs including LOCUS: Responsible Real Estate Developers and Investors, Form Based Codes Institute and TOD Finance and Advisors, Inc., a for-profit subsidiary of Smart Growth America.

Christopher has led LOCUS and Smart Growth America's national and regional public policy and advocacy efforts on a range of issues including securing over \$20 billion in transit-oriented development and local infrastructure financing in the recent federal transportation legislation, FAST Act. Under Christopher's leadership, LOCUS has grown to become a national leader known to be unafraid to tackle some of the toughest challenges facing the smart growth real estate industry today. In 2014, Christopher launched the Attainable Housing and Social Equity Initiative which has assisted local communities to develop place-based, market-driven strategies aimed at encouraging economic growth while ensuring accessibility and social equity in great walkable urban places.

Over the past nine years, Christopher has advised cities on community revitalization and sustainable and equitable economic development, including serving as an advisor to USDOT's LadderSTEP Pilot Cities (Atlanta and Baton Rouge). In addition, he has facilitated numerous deal-making opportunities that have produced over \$1 billion in new smart growth real estate deals.

Prior to joining LOCUS, Christopher served as a Consultant for Government Affairs and Campaigns at M+R Strategic Services. As a consultant, Christopher worked with various clients including Transportation for America – a broad, diverse and unprecedented coalition advocating for a national vision for a 21st-century transportation system. For three years, Christopher served as Transportation for America's Senior Campaign Advisor and Deputy Director. In addition to his work on transportation and real estate issues, Christopher brings over fifteen years of experience in government relations, advocacy and coalition building and program management. He currently serves as an active member of Urban Land Institute (TOD Product Council, the Real Estate Executive Council and serves as Treasurer and the Board of Directors Director of African American Real Estate Professional of DC.

Christopher received a BA/MA in Government and Politics from St. John's University, specializing in Public Administration.