

J M GOLDSON

EMPOWERING PEOPLE — CREATING COMMUNITY

10 December 2021

Leedara Zola
Truro Housing Authority
PO Box 2030
Truro, MA 02666

RE: Quotation for the Medway Housing Production Plan Update

Dear Ms. Zola and Truro Housing Authority Board members:

In response to the Request for Qualifications (RFQ) for the Truro Housing Needs Assessment and Housing Production Plan (HPP) update released on November 25, 2021, I am pleased to submit our quotation to provide consulting services.

JM Goldson is a small and dynamic community planning consulting firm based in Boston, MA. We are certified in Massachusetts as a Women Business Enterprise (WBE). After a decade serving as a community planner in the public sector, I founded JM Goldson in 2006. Our team at JM Goldson specializes in comprehensive master planning, strategic planning, housing needs assessments and Housing Production Plans, housing trust action plans, community preservation, land use, community engagement, and GIS mapping and spatial analysis.

Our team takes pride in working closely and collaboratively with our client communities to create customized, data-driven, and thoughtful plans that help cultivate healthy, equitable, inclusive communities. We were honored to have led the Winchester Master Plan project, which achieved the MA-APA 2020 Outstanding Comprehensive Master Planning Award for its high quality and creativity.

Just in the past six years, our team has completed about **60 housing plans and needs assessments** including **37 HPPs**. I am honored to have been selected as the principal author of three Massachusetts Housing Partnership guidebooks: the Community Preservation Act and Affordable Housing guidebook, *Create, preserve, support* (2016); the *MAHT Implementation Manual* (2015); and the award-winning *MAHT Guidebook* (2009).

We would be delighted to work with the project team and the Truro community on this important planning effort.

We have provided a complete submission per the requirements of the RFQ. If you need additional information or have any questions, please don't hesitate to contact me at 617-221-4003 or Jennifer@jmgoldson.com. We look forward to hearing from you.

Sincerely,



Jennifer M. Goldson, AICP
Founder and Managing Director

QUALIFICATIONS

JM Goldson's team, led by professional planner and founder, Jenn Goldson, strives for excellence and creativity in planning to harness opportunities for transformative change and social equity.

*"Jenn is very accomplished working with communities on the sensitive issue of affordable housing. She is very patient with the various stakeholders, which often have disparate needs." – Client
Response from JM Goldson's Annual Client Satisfaction Survey, February 2021*

Jenn Goldson, AICP, Founder and Managing Director

Jenn brings over 25 years of professional expertise to JM Goldson that includes work in comprehensive planning, affordable housing, historic preservation, open space conservation, and community engagement. Jenn worked in the public sector as a land use and long-range planner for the Town of Brookline and the community preservation program manager for the City of Newton prior to forming JM Goldson in 2006. Throughout her career, Jenn has focused on creating great communities that balance preservation and development. She is committed to advancing forward-thinking visions that promote greater diversity, equity, and social justice in communities – for the benefit of all.

Jenn completed a Bachelor of Science in Historic Preservation from Roger Williams University and a Master of Community Planning from the University of Rhode Island. She is certified by the American Institute of Certified Planners. Jennifer's AICP certification can be furnished upon request.

Delaney Almond, Community Planning Analyst

Delaney is a Geographic Information Systems (GIS) analyst and an urban planner with experience working in local and regional planning both in Massachusetts and around the world. In her role as community planning analyst, Delaney prepares GIS and spatial analysis including to support housing needs assessments and development constraints analysis for Housing Production Plans in addition to preparing complex buildout analysis and other technical analysis. Delaney is also a skilled researcher, writer, and communicator, and aids with all aspects of preparing Housing Production Plans, Community Preservation Plans, Master Plans, and Housing Trust Action Plans.

Delaney graduated from the University of Florida in 2017 with her Bachelor of Science in Sustainability and the Built Environment, and in 2018 with her Master of Arts in Urban and Regional Planning.

Jamie Shalvey, Community Planning Assistant

Jamie Shalvey began working with JM Goldson in 2017, after graduating from the University of Virginia. She worked as a Community Planning Assistant in 2017 and 2018, assisting with research, data analysis, writing, and community engagement on multiple projects. In 2021, Jamie began working with JM Goldson again. In her capacity as Community Planning Assistant.

Jamie's interest in learning more about affordable housing production led her to Moab, Utah, where she worked for a small affordable housing developer that builds sustainable housing using natural materials. In 2020, Jamie began the Master of Urban and Regional Planning program at Portland State University. In the program, her studies focus on housing and community development.

PROPOSED PROJECT TIMETABLE

Our proposed schedule for completing the project pans about six months with anticipated local approval by the end of September 2022. We have designed a slightly longer planning process than anticipated in the RFP because it will more realistically accommodate the level of community engagement anticipated by the Town for this project. We also created a schedule beginning in March due to our current client commitments. We can commit to this schedule if the Town provides notice to proceed no later than 1/28/22. Although we are suggesting a modified timeline, our schedule is honest and viable, and we have a strong record of staying on schedule for our projects.



COST/QUOTATION FOR SCOPE OF SERVICES

Below we provide an itemized proposed budget for each phase of the engagement as described in the RFQ. The cost estimates below are inclusive of all items listed in the RFQ's Scope of Work with no exceptions.

Tasks One and Two and Four – Traditional and Enhanced Data Collection and Analysis: \$11,800

- Review prior plans, studies, and other background information as pertinent
- Prepare traditional draft needs assessment, using most recent available US Census, ACS, and other data including MLS, Banker and Tradesman/The Warren Group, as well as local assessor's data.
- Prepare customized need analysis including focus groups and interviews for up to 35 stakeholders with a variety of perspectives on housing needs and issues, including local business owners, representatives from boards and committees such as the Comprehensive Plan Committee and the Walsh Property Community Planning Committee. These focus groups and interviews, as possible, would be conducted in person along with a guided town tour of key sites and areas.
- Prepare draft development constraints analysis, including updated mapping analysis and implementation capacity analysis.
- Prepare Draft Housing Needs Assessment based on traditional and enhanced data collection and analysis
- This task includes two meetings with the Housing Authority Board/project oversight committee – one meeting to kick off the project and review the schedule and the second meeting to review preliminary findings of the needs assessment and plan for the first community forum.

Task Three – Community Engagement: \$8,000

- Provide customized outreach materials including flyers, social media graphics, email blurbs, and press release.
- This includes a community survey focused on housing needs and issues from participant perspectives and includes opportunities for open ended questions as well as targeted questions based on specific responses (e.g., looping to questions about aging in the community, year-round renting in the community, etc.). The survey is online and can be provided as a paper survey.
- Two virtual public forums: The first focused on sharing preliminary results from the housing needs assessment and interactive activities with participants to envision Truro's best housing future. The second focusing on sharing ideas for goals and strategies with interactive activities to better understand community priorities, identify other opportunities, and provide general feedback on the ideas.
- This task includes two meetings with the Housing Authority Board/project oversight committee – one after the first community forum and one after the second forum to review results and set direction for the draft plan.

Task Five: Prepare Draft HPP: \$4,700

- Prepare draft report based on engagement and analysis results
- Meet with the Housing Authority Board/project oversight committee to review
- Revise based on review and release for public review and presentation



Tasks Six and Seven – Presentation and Approval: \$2,900

- Present to gain approval from the Planning Board and Select Board
- Revise as indicated based on public review and Planning Board/Select Board review
- Finalize and make ready to submit to DHCD for approval

Our total quote is a flat fee of **\$27,400** which includes anticipated expenses including printing, postage, and travel costs. Note that we were conservative with this scope and budgeted for one trip so that all the focus groups, a guided community tour, and interviews are in person where possible. However, given the project budget, it is possible to add a second trip, if desired for any other tasks.

REFERENCES

JM Goldson was the lead consultant recently (within the past year) on the following three Housing Production Plans: Weston HPP (approved in 2021); Ipswich HPP (approved in 2020); and Sherborn HPP (approved in 2017). The following three contacts can provide references for JM Goldson's work on these projects.

- Imai Aiu, Weston Town Planner, aiu.i@westonma.gov, 781-786-5065
- Kristen Grubbs, Ipswich Town Planner, kristeng@ipswichma.gov, 978-356-6607
- Addie Mae Weiss, Sherborn Housing Partnership Committee, addiemaeweiss@gmail.com, 617-921-4236

SAMPLES OF WORK

You can download these three plans at the following links – all our HPPs provide a detailed housing needs assessment that is incorporated into the plan:

Ipswich HPP:

https://www.dropbox.com/s/capyiawhywbbkbf/Ipswich%20HPP%20FINAL_111620%20Approved.pdf?dl=0

Weston HPP:

<https://www.dropbox.com/s/8mn9npd33r2xgke/Medford%20HPP%20Draft%20030121.pdf?dl=0>

Sherborn HPP:

https://www.dropbox.com/s/74glsks12ex8slb/SherbornHPP_060917.pdf?dl=0