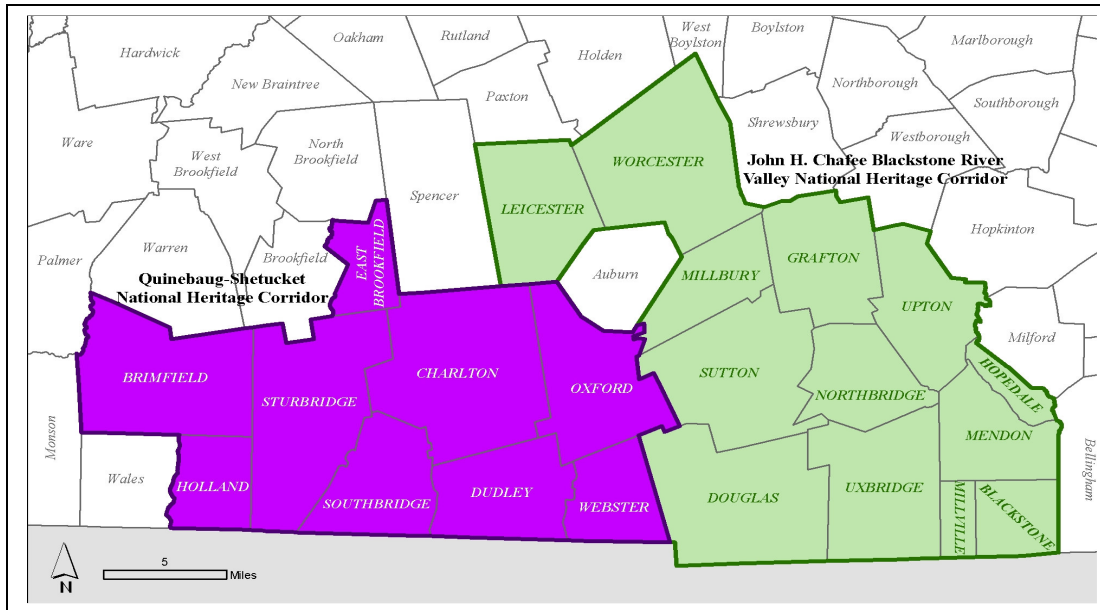




Heritage Landscape Inventory Program Regional Planning Tool and Training Needs Assessment



October 2006

Massachusetts Department of Conservation and Recreation
Division of Planning & Engineering
Office of Cultural Resources

Massachusetts Department of Conservation & Recreation

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Information for this planning assessment was collected through the above organizations as well as from various state, regional and local entities including: Executive Office of Environmental Affairs, Department of Agricultural Resources, Massachusetts Historical Commission, Massachusetts Highway Department, Massachusetts Attorney General's Office, Central Massachusetts Regional Planning Commission, Pioneer Valley Planning Commission, and municipal websites, planning departments and planning boards.

DISCLAIMER

The information contained within this report is current as of September 30, 2006. The document will be updated as needed.

October 2006 ☼

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Project Overview

The Massachusetts Department of Conservation and Recreation (DCR), in conjunction with the John H. Chafee Blackstone River Valley National Heritage Corridor (BRV) and the Quinebaug and Shetucket Rivers Valley National Heritage Corridor's Green Valley Institute (GVI), came together in Spring 2006 to prepare to bring DCR's Heritage Landscape Inventory (HLI) program to the Massachusetts communities in these two contiguous heritage areas.

DCR's Heritage Landscape Inventory program provides the technical services of a multi-disciplinary consulting team to work in coordination with regional partners and closely with communities on the identification of heritage landscapes. Heritage landscapes are those special places and spaces that contain both natural and cultural resources which help to define the character of a community and reflect its past. They are the result of human interaction with the natural resources of an area, which have influenced the use and development of the landscape.

This project provides an opportunity for residents to come together and identify those landscapes that make their community unique. The consulting team facilitates that process, engages in fieldwork with local residents, and then prepares a Reconnaissance Report that documents the landscapes that were locally identified and provides planning recommendations for their protection. Through this project, DCR and their regional partners are aiming to increase awareness about the many different types of heritage landscapes they have and help communities and their regional advocates take proactive steps to plan for their preservation.

The first phase of the HLI program in the Blackstone River Valley and Quinebaug and Shetucket National Heritage Corridors involved the preparation of a regional historic context and planning analysis. The historic context explores the landscape development of the region in order to anticipate the range of landscape types that will be encountered during the inventory phase. In addition, DCR and its partners undertook a planning analysis to identify planning tools that can be used for the protection of heritage landscapes and determine which of these are currently employed by communities in the region. The planning analysis was also intended to help identify potential training opportunities for the development of a public education initiative. This educational initiative will focus on regional needs, and will be further informed by the reconnaissance survey work with participating communities. Combined, the regional historic context and planning analysis are being used to prepare the project team for the implementation of the HLI partnership project in this region.

Purpose

Providing proactive planning recommendations to communities to guide them in the protection of their heritage landscapes is an integral part of the DCR's Heritage Landscape Inventory program. In preparation for working with the 22 Massachusetts communities within the Blackstone River Valley and Quinebaug-Shetucket National Heritage Corridors, DCR assembled information about critical planning tools and documents. These tools are routinely reviewed during the HLI process and frequently come up as part of the specific and general recommendations for communities because they have the capacity to protect heritage landscapes. Some of these tools have been looked at in the recent past by the Massachusetts Historical Commission and the Office for Commonwealth Development for their capacity to promote preservation and smart growth. The purpose of this inventory of planning tools was three-fold:

1. To provide DCR, BRV and QSHC with more information about planning tools currently employed in each community to make more efficient use of consultant time and concentrate on resource specific issues.
2. To get a better handle on the level of planning that has been undertaken in the region to date, in order to identify potential areas where this region could benefit from focused training and education about specific land protection issues and the planning tools that can be used to address them.
3. To help connect communities with ongoing state agency initiatives such as Smart Growth programs, as well as to help these agencies better understand the needs of these communities.

Report Organization

What follows is a brief synopsis taken from the regional historic context identifying regional similarities and issues, followed by a table of the tools that can be used to address these issues for quick reference purposes. This is followed by a review of all of the tools for which data was collected – what they are, how they can be used to protect heritage landscapes, and which communities in this region are currently using them. The report concludes with a training needs assessment and recommendations, as well as an outline of the Heritage Landscape Inventory’s Public Education Initiative. The results of this assessment, combined with what is learned in the field, will guide DCR, BRV and Q-S in the development and coordination of some focused educational training programs that can be launched in this region and beyond. The Appendices include an annotated list of all of the state, regional and municipal entities that can work together to help protect heritage landscapes, the complete historic context as well as the planning data that was collected.

An overview: The Blackstone River Valley and the Quinebaug and Shetucket River Valleys

Note – this section is taken directly from the conclusion of the regional historic context – the entire document is available in the Appendix.

The Blackstone Valley and Quinebaug-Shetucket Rivers Valley Heritage Corridors host remarkably similar natural, historic and cultural landscapes. Both Heritage Corridors are characterized by fields, hills, forests, streams, and rivers which influenced the siting of early farms, towns, and mill villages. From those early settlement patterns and landscape features, the Blackstone and Quinebaug-Shetucket Valleys developed strong regional identities. Farms and hilltop towns evolved into areas prized for their scenic and historic qualities. Mill villages and urban centers sited along the region's rivers tell the story of the American Industrial Revolution.

Just as the Blackstone Valley and Quinebaug-Shetucket Valley's many textile mills once wove together warp and weft, so too, the region's communities are woven together by a shared history of human activity that begins with the Nipmuc, whose various tribes appear to have lived in and used the region's natural resources in similar ways. The first colonial settlers, despite coming to the valleys from different directions, established virtually identical settlement patterns consisting of early mill sites and agricultural farmsteads. Both regions experienced early economic success as a result of agricultural production and market activity in towns such as Sutton, Mendon, Sturbridge, and Oxford. Transportation developments along the post roads spurred similar growth in Brimfield and Sutton. As the Industrial Revolution dawned on the Blackstone River, technological advances in mill manufacturing and mill village development patterns in Northbridge and Blackstone quickly made their way to the Quinebaug-Shetucket Valley towns of Webster and Southbridge. The wealth brought by industrial production changed the region's cultural landscape as successive waves of industrialists and immigrants built churches, schools, houses, and social institutions. As Worcester developed into a dense urban industrial center in the north, a smaller, but equally diverse industrial/commercial center developed to the south in Southbridge/Webster. Both the Blackstone and Quinebaug-Shetucket Valleys suffered from the effects of the Great Depression and the post World War II urban flight that has altered the character of many earlier settlement patterns.

Regional similarities exist in the patterns of settlement, architectural styles, and industrial production. The numerous inventions and patents developed in the region sustained the rise of industrial manufacturing, increased the efficiency and productivity of agriculture, and made possible the intensive development of mill villages, town centers and urban communities. The region's Native Americans, yeoman farmers, and industrialists have left a rich tapestry of place names, farm fields, orchards, mill villages and urban streetscapes. The Civilian Conservation Corps, The Olmsted Firm, Warren H. Manning, and Arthur Shurcliff all shaped landscapes in both the Blackstone and Quinebaug-Shetucket Valleys. Other artists, designers and architects, known and unknown, have left their mark on the region's buildings, monuments and parks.

As development continues to occur in the Blackstone Valley and Quinebaug-Shetucket Valley Heritage Corridor communities, rapid change is altering earlier cultural landscape features. While changing patterns of settlement, immigration and transportation are clearly an aspect of the region's cultural history, some of the most treasured character-defining features may soon be lost, as low density suburban housing and commercial development continue to replace agricultural landscapes. Historic town centers and mill villages are facing renovation, demolition and redevelopment. The character of scenic byways is changing as new commercial development takes hold along rural and state numbered roads.

In the Blackstone Valley, a great deal of recent development has already altered the character of some communities, and steps are being taken to manage future growth in a variety of ways. Partnerships between public and private organizations have aided in the protection of heritage landscapes through zoning bylaws, preservation restrictions, open space acquisition, and planning for smart growth. In the Quinebaug-Shetucket Valley, it appears that the next era of growth is just beginning to impact the region's remaining open space, mill villages, historic town centers and roads. An important task remains to identify and document the region's heritage landscapes so that every community's character-defining natural, historic and cultural features will be incorporated into future Smart Growth planning initiatives.

DCR's Expectations

Based upon the development of this historic context for the region, as well as the assembly of information for the regional planning tools analysis, DCR has identified the following heritage landscape issues as those that will likely emerge as generating the most interest in this region:

- 1) Agricultural Preservation
- 2) Downtowns
- 3) Mill Villages/Neighborhoods
- 4) Industrial Properties
- 5) Open Space
- 6) Scenic Roads

Communities across the state are concerned with the maintenance of working agriculture and other open space, economically viable downtowns, cohesive neighborhoods, and scenic roads. What will be more prominent in this region are issues relating to the protection of its unique and amazing collection of industrial properties and mill villages.

Planning Tools for Heritage Landscape Protection

The communities in the Blackstone and Quinebaug –Shetucket river valleys represent a wide range of planning activity levels, commensurate with their size, resources and municipal capacity. Almost all have some ability to at least guide large developments through site plan review, and more than half have current community planning documents and are actively participating in the Commonwealth Capital program to help improve their chances of receiving funding from state agency programs. On the other hand, none of the communities in this region have enacted a right to farm bylaw, scenic overlay zoning or smart growth zoning.

A number of different planning tools can be used to proactively protect heritage landscapes – some are obvious, while others are not so obvious. There are three tools however that every community should actively pursue, since they apply to all of the issues noted below, as well as some others that might be unique to their community: participation in the **Commonwealth Capital Program**, passing the **Community Preservation Act**, and maintaining up to date **Community Planning Documents** that will be useful to promote and direct any protection effort. Data has also been collected on the receipt of **Grant Funding** from the 4 most directly applicable sources to pursue planning or resource protection efforts: **Smart Growth Grants** from EOEa (noted as SG on the table in the appendix); **Historic Landscape Preservation Grants** formerly awarded by DCR (noted as DCR in the table); **Massachusetts Preservation Projects Fund grants** awarded by MHC (noted as MHC in the table); and **preservation grants** offered by both of the Heritage Corridors (noted as NHC in the table). The numbers reflect the total number of grants the community has received to date from these sources. Organizations within these communities are no doubt also pursuing grants from other public and private resources that have not been captured here – but this tally should provide an indication of the capacity these communities have to obtain outside funding for their projects.

Some of the expected issues of concern in the communities in this region can be addressed through the combined use of multiple tools. The table below lists the issues identified and expect to be of concern to these communities, along with the list of tools that can be used to address them for quick reference purposes. Those that can have the most direct impact are italicized. Information about each of these tools follows. For some of these tools, it is also noted where further information can also be found in the Smart Growth Toolkit. The list of communities that are using these tools (and any others that are relevant to natural and cultural resource protection) are included in the table found in the Appendix.

Issue	Tools
Agricultural Preservation	Corridor Protection Overlay District <i>Flexible Development Zoning</i> Local Historic Districts <i>Open Space Zoning</i> <i>Right to Farm Bylaw</i> Scenic Overlay District <i>Scenic Vista Protection Bylaw</i> <i>Site Plan Review</i> <i>Transfer of Development Rights</i>
Downtowns	<i>Adaptive Reuse Overlay</i> <i>Corridor Protection Overlay District</i> <i>Demolition Delay Bylaw</i> <i>Design Review</i>

	<p><i>Downtown Revitalization Zoning</i> <i>Local Historic Districts</i> <i>Neighborhood Architectural Conservation District</i> Scenic Byway Scenic Road Bylaw Shade Tree Act Site Plan Review <i>Smart Growth Zoning</i> <i>Transfer of Development Rights</i> <i>Village Center Zoning</i> Wetlands Protection Bylaw</p>
Mill Villages/Neighborhoods	<p><i>Adaptive Reuse Overlay</i> Corridor Protection Overlay District <i>Demolition Delay Bylaw</i> <i>Design Review</i> Flexible Development Zoning <i>Local Historic Districts</i> <i>Neighborhood Architectural Conservation District</i> Scenic Overlay District Scenic Road Bylaw Shade Tree Act Site Plan Review <i>Smart Growth Zoning</i> Transfer of Development Rights <i>Village Center Zoning</i> Wetlands Protection Bylaw</p>
Industrial Properties	<p><i>Adaptive Reuse Overlay</i> Areas of Critical Environmental Concern Corridor Protection Overlay District Demolition Delay Bylaw <i>Design Review</i> Downtown Revitalization Zoning Flexible Development Zoning <i>Local Historic Districts</i> <i>Scenic Vista Protection Bylaw</i> <i>Site Plan Review</i> <i>Smart Growth Zoning</i> <i>Transfer of Development Rights</i> Village Center Zoning Wetlands Protection Bylaw</p>
Open Space	<p><i>Areas of Critical Environmental Concern</i> Corridor Protection Overlay District <i>Flexible Development Zoning</i> <i>Open Space Zoning</i> Right to Farm Bylaw <i>Scenic Overlay District</i> Scenic Vista Protection Bylaw <i>Site Plan Review</i> Smart Growth Zoning <i>Transfer of Development Rights</i> Wetlands Protection Bylaw</p>

Scenic Roads	Areas of Critical Environmental Concern <i>Corridor Protection Overlay District</i> Design Review Flexible Development Zoning Local Historic Districts Neighborhood Architectural Conservation Districts Open Space Zoning Right to Farm Bylaw <i>Scenic Byway</i> <i>Scenic Roads Bylaw</i> <i>Scenic Overlay District</i> <i>Scenic Vista Protection Bylaw</i> <i>Shade Tree Act</i> Site Plan Review Village Center Zoning
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Data has been collected on this wide range of bylaws, ordinances, planning efforts and programs to see how proactive the communities in these two heritage corridors have been to date. Below are brief descriptions of each of the tools mentioned above, along with notations on how they are being used in this region and statewide (where this data is available) for comparison so that this region can be compared with statewide trends. These tools are organized alphabetically, so as to not place more importance on some over others. Each community must look towards the multiple tools that are available, and evaluate them for their potential effectiveness to protect the range of resources they have against the threats that they are facing. *This report is not meant to serve as an absolute compendium, but rather a collection of the most commonly utilized and/or most effective means of protecting heritage landscapes.*

Adaptive Reuse Overlay District

Administered by: Planning Board

Additional players: Historical Commission, Conservation Commission

How this can protect heritage landscapes: Promotes the reuse of historic buildings in an effort to maintain important historic resources.

An Adaptive Reuse Overlay District is superimposed on one or more established zoning districts which may be used to permit incentive based reuses of existing built properties. These districts can be created to allow for the adaptive reuse of properties of a certain kind, or within a specified area within a community. As an overlay zone, all regulations pertaining to the underlying zone apply, except to the extent that the overlay zone modifies or provides for alternatives to the underlying requirements. In this region, adaptive reuse overlays are often put in place to encourage the redevelopment of historic mill buildings, which are character defining features of many of these communities. There are currently 6 communities with Adaptive Reuse Overlay Districts in place in this region.

Information on current zoning obtained from town websites and contact with each town and is current as of 8/06.

Areas of Critical Environmental Concern

Administered by: DCR's ACEC program staff

Additional players: Local ACEC stewardship groups, Conservation Commissions and watershed groups

How this can protect heritage landscapes: State projects are reviewed to minimize their impacts to the resources within an ACEC.

Areas of Critical Environmental Concern (ACECs) are places in Massachusetts that receive special recognition because of the quality, uniqueness and significance of their natural and cultural resources. These areas are identified and nominated at the community level and are reviewed and designated by the state's Secretary of Environmental Affairs. DCR administers the ACEC Program and closely coordinates with other state agency programs in implementing the goals of ACEC designation. Within ACECs, projects with state agency actions, permits, or funding require closer scrutiny through the Massachusetts Environmental Policy Act review process to avoid, minimize, and mitigate damage to the environment. Local and regional stewardship of ACEC resources is achieved through the shared efforts of citizens and public and private partners and groups who work together. There are currently 28 ACECs in the Commonwealth – one of them, the Miscoe-Warren-Whitehall Watershed ACEC, includes land within Grafton and Upton.

Information came from the ACEC program staff and is current as of 7/06.

Commonwealth Capital Program

Administered by: Massachusetts Office for Commonwealth Development

Additional players: Planning Department/Planning Board

How this can protect heritage landscapes: Improves chances of receiving grant funding from critical state programs that help to plan for and actively protect resources.

The Commonwealth Capital policy of the Office for Commonwealth Development (OCD) coordinates state capital spending programs that affect development patterns to ensure that state investments promote projects consistent with sustainable development principles. Municipalities seeking funding from approximately 20 state grant programs available through OCD agencies should first complete an application that evaluates their current planning and land use activities, resulting in a score that is factored into their applications to these state grant programs.

There are currently 16 communities in this region that have gone through the Commonwealth Capital scoring process in FY06 - their scores range from 40 to 104 (out of a possible high score of 140)

Community Planning Documents

Administered by: Planning Department/Planning Board

Additional players: Open Space Committee, Historical Commission, Conservation Commission, and sub-committees formed to spearhead specific planning efforts

How this can protect heritage landscapes: Identifies important resources to a community as well as ways to protect them while planning for the direction of new growth.

There are a number of planning exercises and accompanying documents that communities can undertake, their efforts and regularity often depending upon if they have a staffed planning department or if their planning activities are done entirely by a volunteer planning board. The one planning document that all communities must complete and regularly update in order to obtain access to EOEA's self-help grant program is the Open Space and Recreation Plan. Through funding provided via Executive Order 418, many communities now also have community development plans as well. In cities, you can often find neighborhood plans, and in a few cases, some communities have a municipal Preservation Plan or a Communitywide Archaeological Survey, the latter of which is conducted by professional archaeologists and results in the identification of known and predicted locations of archaeological sites. Finally, some communities also have a communitywide Master Plan (sometimes also called a Long Term or Long Range Plan), which serves to include other planning efforts, address aspects not covered by individual

plans and provide direction for the future of a community that serves all interests. In general, all of these planning documents help to identify community values and goals, and proactive measures that a community would like to take to achieve these goals and protect the values that are important to their community. Given the wide range of heritage landscape types, they can, and should, be a part of each and every one of these planning efforts. In this region, 11 communities have Master Plans, 12 have current (i.e., less than 5 years old) Open Space & Recreation Plans, 11 have Community Development Plans, and none of them have either a Communitywide Preservation Plan or a Communitywide Archaeological Survey.

Information on current planning documents obtained from town websites and contact with each town and is current as of 8/06.

Community Preservation Act

Locally Administered by: Community Preservation Committee

Additional players: Planning Dept/Planning Board, Open Space Committee, Historical Commission, Conservation Commission, Affordable Housing Advocates

How this can protect heritage landscapes: Funds from the CPA can be utilized to fund planning and preservation projects as well as acquire land.

The Community Preservation Act is statewide enabling legislation that allows communities to assemble funds for historic preservation, open space protection and affordable housing through a local property tax surcharge (up to 3%, with some allowable exemptions) and state matching funds. These funds can be used to fund a wide variety of activities within these 3 primary areas. Currently 110 communities (roughly 30%) have passed the CPA, and 7 more communities will be voting on this at fall town meeting. In this region, 4 of the 22 communities (roughly 18%) have passed the CPA. Statewide, 58 other communities have tried to pass the CPA, but were unsuccessful – only 1 of those communities – Sutton – is in this region.

Information came from the Community Preservation Coalition website which was last updated on 6/06.

Corridor Protection Overlay District

Administered by: Planning Department/Planning Board

Additional players: Regional Planning Agency, Board of Selectmen

How this can protect heritage landscapes: Protection of heritage landscapes and key resources that are important features of a designated corridor.

A Corridor Protection Overlay District is intended to promote appropriate development within a given corridor, serving to protect natural (and sometimes cultural) resources within the corridor. As an overlay zone, all regulations pertaining to the underlying zone apply, except to the extent that the overlay zone modifies or provides for alternatives to the underlying requirements. This kind of overlay district can be used to coordinate development among communities. In this region, there is a Corridor Protection Overlay for Route 146 that involves 3 communities. This overlay is intended to facilitate long-term economic growth while also promoting high quality development that preserves the scenic, natural, and cultural resources of the Blackstone Valley. The Corridor Protection Overlay District is unique in that it can be cooperatively used by adjoining communities to help maintain continuous protection beyond town boundary lines.

Information on current zoning obtained from town websites, the state Attorney General's office and contact with each town and is current as of 7/06.

Demolition Delay Bylaw

Administered by: Historical Commission

Additional players: Building Department, Planning Department/Planning Board

How this can protect heritage landscapes: Demolition delays encourage alternatives to the loss of historic buildings and structures, thereby helping to save critical elements of a heritage landscape.

A Demolition Delay Bylaw authorizes a procedure whereby requests for a permit to demolish a historic building must first be reviewed and approved by the local historical commission. Demolition Delay Bylaws are either list-based (applying only to a specific list of buildings that have been previously identified), age based (applying to all buildings that are older than a certain age – typically 50 years), or categorical (applying only to resources that meet a specific criteria, such as only buildings that have been documented on Massachusetts Historical Commission forms). If the historical commission does not approve of the demolition and deems a structure significant, it can impose a delay period, which provides a window of time in which the property owner is encouraged to explore alternatives to demolition. Delay periods are typically 6 months in duration, but some communities have delays of up to one year, which have proven to be more effective. There are currently 110 communities of the 351 in the commonwealth – roughly 30% - that have a Demolition Delay Bylaw. In this region, 3 of the 22 communities – less than 15% - have a Demolition Delay Bylaw.

Information came from MHC records and was current as of 8/06.

Design Review

Administered by: Design Review Board

Additional players: Planning Department/Planning Board

How this can protect heritage landscapes: Design Review can help protect a heritage landscape by making sure that the overall character of an area is maintained.

Design Review is a non-regulatory process that is undertaken by a town appointed Design Review Board. The board will review the design of new construction and additions that are typically taking place in already built up areas, and recommendations are made to the planning board to help preserve appropriate building patterns and architectural styles and to discourage such things as street level setbacks. Design Review includes determining project impacts on the long term viability of the surrounding area and proposes measures to mitigate those impacts thought to be negative. Design Review Boards often limit their review to exterior architectural features, site design and signage. As of 2003, there were 42 communities that had Design Review Boards in place – 2 of them, Sturbridge and Southbridge, are in this region.

Information on current zoning obtained from town websites, MHC, and contact with each town and is current as of 8/06.

Downtown Revitalization Zoning

Administered by: Planning Department/Planning Board

Additional players: Historical Commission, Chamber of Commerce/Local Business Organizations

How this can protect heritage landscapes: Serves to protect downtown features while encouraging businesses of an appropriate scale to locate there, serving to help retain heritage landscapes such as village centers.

Downtown Revitalization Zoning seeks to encourage businesses to locate in downtowns. Zoning of this nature is typically written to be attractive to businesses of a certain kind that would work well within the given infrastructure and transportation needs, but can also incorporate some of the same elements as

village center zoning, such as encouraging mixed use development at a pedestrian friendly scale, with minimal setbacks and offsite parking.

Information on current zoning obtained from town websites, MHC, and contact with each town and is current as of 8/06.

Flexible Development Zoning

Administered by: Planning Department/Planning Board

Additional players: Historical Commission, Conservation Commission

How this can protect heritage landscapes: Provides the opportunity for protection of key features during the development of large parcels of land.

Flexible Development Zoning allows for greater flexibility and creativity when subdividing land, to conform and work with the natural and cultural resources of a site and minimize alteration or damage to these resources, rather than follow standard requirements of subdivision regulations. While this does not prevent land from being subdivided, it does allow for the protection of some features, serves to preserve some undeveloped land, and promotes better overall site planning. In this region, 6 communities have passed Flexible Development Bylaws.

Information on current zoning obtained from town websites, MHC, and contact with each town and is current as of 8/06.

Local Historic Districts

Administered by: Local Historic District Commission

Additional players: Local Historical Commission

How this can protect heritage landscapes: Through the protection of key architectural features of buildings, Local Historic Districts help preserve historic resources and maintain the character of an area.

Local Historic Districts provide for a review of any proposed exterior changes to a building that are viewable from a public way, so they are very effective at controlling inappropriate changes and maintaining the character of a heritage landscape. The kinds of changes that are reviewed vary according to the terms of the local bylaw. There are currently 4 communities in this region that have at least 1 Local Historic District, and there is currently 1 community in this region that has formed a Local Historic District Study Committee.

Information came from the 2005 State Register and from MHC and was current as of 9/06.

Neighborhood Architectural Conservation Districts

Administered by: Neighborhood Architectural Conservation District Commission

Additional players: Historical Commission, Planning Department/Planning Board

How this can protect heritage landscapes: Helps maintain the overall character of historic neighborhoods.

Neighborhood Architectural Conservation Districts (sometimes known as Neighborhood Conservation Districts) are local initiatives that recognize special areas within a community where the distinctive characteristics of the neighborhood are important. They are less restrictive than Local Historic Districts in that they focus on a few key architectural elements and massing, scale and setback in an effort to embrace overall neighborhood character. However, changes are reviewed by a commission to ensure that the overall neighborhood character is maintained. There are currently only 4 communities in the state that have established Neighborhood Conservation Districts – Boston, Cambridge, Lowell and Northampton –

and one community that has passed the bylaw but has not yet established any districts (Lincoln). None of the communities in this region has explored this tool yet.

Information came from MHC records and was current as of 9/06.

Open Space Zoning

Administered by: Planning Department/Planning Board

Additional players: Conservation Commission, Open Space Committee, local/regional land trust

How this can protect heritage landscapes: Requires permanent protection of open space within a development.

Open Space Zoning comes under several names, and in some communities is known as a Cluster Development Bylaw, Open Space Communities Zoning, Open Space Development Overlay District, Open Space Preservation Subdivision, or an Open Space Residential Development – the latter of which seems to be the term most commonly used. This tool allows the same overall amount of development that is already permitted, but requires new construction to be located on only a portion - typically half - of the parcel. The remaining open space is permanently protected under a conservation restriction co-signed by a local conservation commission or land trust, meaning that agricultural land or a scenic vista can be preserved while allowing development elsewhere. This is a very popular tool statewide, and 9 communities have passed it in this region.

Information on current zoning obtained from town websites, MHC, and contact with each town and is current as of 8/06.

Right to Farm Bylaw

Administered by: Planning Department/Planning Board, Agricultural Commission

Additional players: Open Space Committee, Historical Commission, Community Preservation Committee

How this can protect heritage landscapes: Helps a community retain active agricultural land.

A Right to Farm Bylaw asserts the rights of farmers to pursue agricultural activities, provides community support for farming activities and requires dispute resolution so that abutters cannot make nuisance claims. Agricultural landscapes are widely considered to be significant heritage landscapes for which there is constant concern of potential development. This bylaw serves to help active farmers remain just that - active. Like the formation of Agricultural Commissions, the interest in passing Right to Farm Bylaws is exploding. Between October 2005 and July of 2006, 25 new communities passed this bylaw, bringing the current total to 49 communities in the state (roughly 14%). None of them is in this region.

Information came from the Dept. of Agricultural Resources and is current as of 7/06.

Scenic Byway

Administered by: Federal Highway Administration

Additional players: Planning Department/Planning Board, Dept of Public Works, Chamber of Commerce/Local Business Organizations, Regional Planning Agency, Heritage Corridor/Area

How this can protect heritage landscapes: Requires Corridor Management Plans to be developed, and provides funding to implement these plans so that the character of the designated Scenic Byway can be retained.

Scenic Byways are quite different from locally designated scenic roads – the National Scenic Byways Program provides funding through state highway departments for planning (and implementation of planning efforts) for regional roads that are demonstrated to have scenic value. Roads must first be

designated a state scenic byway before they can receive national recognition. This program helps to promote tourism by linking road preservation with community economic development. There is currently one state designated Scenic Byway in the region – Route 122, the Blackstone Canal Heritage Highway. *Information on participation in this program came from town websites, the heritage corridor staff, and Mass Highway, and is current as of 9/06.*

Scenic Overlay District

Administered by: Planning Department/Planning Board

Additional players: Historical Commission, Conservation Commission, Board of Selectman

How this can protect heritage landscapes: Helps to limit development in scenic areas, which often include heritage landscapes.

Scenic Overlay Zoning can protect scenic vistas by providing for a no-disturb buffer on private lands, thereby allowing for the protection of scenic elements beyond what the Scenic Roads Bylaw can protect. In addition, it can be written to provide this protection for numbered routes, unlike Scenic Roads Bylaws. It can also provide for some protection of scenic views, by helping to maintain specific viewpoints. No communities in this region have adopted this tool yet.

Information on current zoning obtained from town websites, MHC, and contact with each town and is current as of 9/06.

Scenic Road Bylaw

Administered by: Planning Department/Planning Board, Municipal Highway Department

Additional players: Dept of Public Works, Municipal Tree Warden, Historical Commission, Conservation Commission, Board of Selectman

How this can protect heritage landscapes: Helps to protect trees and stone walls that are within the right of way of a town designated scenic road.

The Scenic Roads Bylaw, which can be adopted at town meeting, requires that a public hearing be held prior to the removal of any trees or stone walls that fall within the public right of way on a town road. The bylaw can be written so it applies to either a predetermined list of identified scenic roads, or it can encompass all roads (other than numbered routes) in a town. This bylaw applies whenever there is any public or private impacts to trees or stone walls within the right of way – therefore anything that might impact these resources, including road widening, utility company work, or even creating private driveways – requires a public hearing. Statewide, approximately 114 communities have passed Scenic Road Bylaws - in this region, 12 communities have passed one.

Information on current zoning obtained from town websites, MHC, and contact with each town and is current as of 9/06.

Scenic Vista Protection Bylaw

Administered by: Planning Department/Planning Board

Additional players: Historical Commission, Conservation Commission, Board of Selectman

How this can protect heritage landscapes: Helps to limit development impacts to scenic vistas, which are often identified as heritage landscapes for their natural and cultural features as well as their historic associations.

Scenic Vista Protection Bylaws require additional design criteria for any proposals for new construction in areas that are determined by the town to be a scenic vista. These bylaws are typically utilized to

protect views of (and from) hilly terrain, so they are not all that common in this part of the state – but that isn't to say that it should not be explored. This tool has not yet been utilized by the communities in this region.

Information on current zoning obtained from town websites, MHC, and contact with each town and is current as of 9/06.

Shade Tree Act

Administered by: Municipal Tree Warden

Additional players: Department of Public Works, Conservation Commission

How this can protect heritage landscapes: Helps to protect historic trees on public property that are a part of a heritage landscape.

The Shade Tree Act is a part of MGL Chapter 87, which defines all trees within the public way as public shade trees. The municipal Tree Warden is responsible for the care, maintenance and protection of all public shade trees (except those within a state highway). Trimming or removal of any trees greater than 1.5" in diameter must go through a public hearing process. Chapter 87 applies to all communities; however, some communities have adopted their own Shade Tree Act Bylaws that provide stricter regulations above and beyond what is mandated in Chapter 87. Five communities have passed their own Shade Tree Act bylaws in this region.

Information on current zoning obtained from town websites and contact with each town and is current as of 9/06.

Site Plan Review

Administered by: Planning Department/Planning Board

Additional players: Open Space Committee, Conservation Commission, Historical Commission, Regional Planning Agency

How this can protect heritage landscapes: Provides opportunities to help decrease impacts of development on heritage landscapes.

Site Plan Review, typically limited to large scale projects and tied to the special permit process, provides the planning board (and other boards and committees, depending upon how the bylaw is written) with an opportunity to consider a variety of community concerns such as impacts to vehicular circulation, scenic vistas, topography and natural resources. This provides the opportunity to comment upon site plans and request changes to the design to address these concerns. Currently, almost all of the communities in this region (Millville is the only exception) require some form of site plan review.

Information on current zoning obtained from town websites, MHC, and contact with each town and is current as of 9/06.

Smart Growth Zoning – Chapter 40R

Administered by: Planning Department/Planning Board

Additional players: Community Preservation Committee

How this can protect heritage landscapes: Directs compact growth to areas that are already developed, which helps discourage growth in other areas that may contain heritage landscapes. It can also be used to help direct mixed-use growth to heritage landscapes that are appropriate to receive it, such as village centers.

Chapter 40R provides financial rewards to communities that adopt special overlay zoning districts allowing as-of-right high density residential development in areas near transit stations, areas of concentrated development, or areas that are suitable for residential or mixed use development. There are currently 5 communities that have passed the first stage of adoption, which is DHCD approval, and have also approved a 40R district at either town meeting or city council – none of them is in this region. (They are Chelsea, Dartmouth, North Reading, Norwood, and Plymouth.) Three others have submitted paperwork seeking approval– again, none of them in this region (Kingston, Lakeville, and Lunenburg). *Information came from personal communication with OCD and was current as of 7/06.*

Transfer of Development Rights

Administered by: Planning Department/Planning Board

Additional players: Agricultural Commission, Conservation Commission, Community Preservation Committee, Local Historical Commission, Open Space Committee, Local Business Organizations

How this can protect heritage landscapes: Discouraging development in sensitive areas (such as agricultural land) and directing it to areas where increased density is appropriate (such as village centers), so it can serve to protect and enhance two different types of heritage landscapes simultaneously.

Transfer of Development Rights (TDR) is a regulatory tool that uses a bylaw to establish two different overlay districts, creating a ‘sending zone’ – areas where development will be discouraged – and a ‘receiving zone’ – an area where development is appropriate. Landowners in ‘sending areas’ sell their development rights (and agree to a permanent deed restriction) to landowners in the ‘receiving areas’ who can then develop in the receiving area at a higher density than what would have otherwise been allowed under conventional zoning. In 2003 there were 8 in the state – none of them in this region.

Information came from MHC and EOEA..

Village Center Zoning

Administered by: Planning Department/Planning Board

Additional players: Community Preservation Committee, Local Historical Commission

How this can protect heritage landscapes: Serves to protect village center features in these types of heritage landscapes.

Village Center Zoning is a type of zoning that aims to meet the needs of a small scale, mixed use area, encouraging horizontal and vertical mixed uses in a pedestrian friendly setting. This kind of zoning encourages compact development by requiring that new construction maintain compatible scale, a reduced (or no) setback, and can also direct parking to discourage large lots in front of buildings. Commercial uses must fit the scale of adjacent neighborhoods and the desired character envisioned. This tool might also be found in the form of Traditional Neighborhood Development, and these two terms are sometimes used interchangeably. In 2003, there were at least 57 communities that had Village Center Zoning, more have since been added. In this region, 8 communities have passed this kind of zoning and are using it to try to prevent sprawl in their downtowns.

Information on current zoning obtained from town websites, MHC, and contact with each town and is current as of 9/06.

Wetlands Protection Bylaw

Administered by: Conservation Commission

Additional players: Planning Department/Planning Board, Watershed groups, ACEC staff and stewardship groups

How this can protect heritage landscapes: Helps minimize impacts to waterfront areas, which are often identified as heritage landscapes.

The Wetlands Protection Act, MGL Chapter 131, Section 40, protects wetlands by requiring a careful review by local conservation commissions of proposed work that may alter wetlands. The law protects not only wetlands, but other resource areas, such as floodplains, riverfront areas, and land under water bodies, waterways, salt ponds, fish runs, and the ocean. Coastline on almost any body of water is highly valued for its cultural and natural resources. Over 100 communities in the state have adopted their own Wetlands Protection Bylaw, providing stricter regulations above what is mandated in Chapter 131. Nine communities in this region have passed their own Wetlands Protection bylaws.

Information on current zoning obtained from town websites and contact with each town and is current as of 9/06.

Training Needs Assessment and Recommendations

The training needs assessment is based upon the data collected in the spreadsheet found in the Appendix, which details which communities in the region employ the planning tools that have been identified as being helpful to heritage landscape protection. Information about existing training opportunities was also gathered. Information on these tools, and any training opportunities, was collected because of their potential ability to impact these communities in a positive way – anywhere there is a lack of a training opportunity currently available, education is needed.

Less than half of the communities in this region have the following tools, and in many cases there are little or no training programs that address them. Two tools that have been implemented by more than half of the communities in this region – scenic roads bylaw and site plan review – are not addressed here, since the use of them is adequately represented in this region.

Tool	Training Opportunities
ACEC	Community trainings conducted on an as needed basis by ACEC program staff.
Adaptive Reuse Overlays	<i>None</i> Information on Brownfields programs is available in the Smart Growth Toolkit, which could be useful for the reuse of industrial sites.
Community Preservation Act	Community trainings conducted on an as needed basis by the Community Preservation Coalition. No current funding for regional conferences.
Communitywide Archaeological Survey	<i>None</i>
Communitywide Preservation Plan	<i>None</i>
Corridor Protection Overlay District	<i>None</i>
Demolition Delay Bylaw	<i>None</i>
Design Review	<i>None</i>
Downtown Revitalization Zoning	<i>None</i> Information on Traditional Neighborhood Development principles is available in the Smart Growth Toolkit, which Downtown Revitalization Zoning could be used to help achieve. EOEA and DHCD both offer technical assistance and occasional training opportunities that support a variety of downtown revitalization efforts.
Flexible Development	<i>None</i>
Local Historic District	Training DVD on LHD design review available from MHC.

Neighborhood Architectural Conservation District	In development by MHC.
Open Space Zoning	New workshop to be offered by the Citizen Planner Training Collaborative. Information also available in the Smart Growth Toolkit, and there are training opportunities through EOEА.
Right to Farm Bylaw (and Local Ag Commissions)	Community trainings conducted on an as needed basis by the Dept. of Agricultural Resources. Handbook on establishing an LAC and the functions it serves is also available online. Information also available in the Smart Growth Toolkit.
Scenic Byway	<i>None</i>
Scenic Overlay District	<i>None</i>
Scenic Vista Protection Bylaw	<i>None</i>
Shade Tree Act	<i>None</i>
Site Plan Review	Training opportunities available through the Citizen trainer Planning Collaborative.
Smart Growth Zoning (40R)	New one being created by the Citizen Planning Training Collaborative; Annual Smart Growth Conference presentations. Information also available in the Smart Growth Toolkit.
Village Center Zoning	EOEA provides training opportunities on Village Center Zoning and Traditional Neighborhood Development. Information on Traditional Neighborhood Development principles is also available in the Smart Growth Toolkit.
Wetlands Protection Bylaws	Regular training provided by the Massachusetts Association of Conservation Commissions

Other topics of interest

Motivating volunteers to serve on local boards and committees – and actually commit time and energy to it - can be very difficult. The abundance or lack thereof of committed volunteers is what can make or break the level of proactive steps that a community can undertake – this is especially true in smaller communities without paid planning staff. A training session revolving around this would also be most helpful.

Grant writing is also an area that many municipal boards and committees also struggle with, and is a topic that is of perennial interest. As seen from the appendix, many of these communities have not pursued funding from any of the 4 grant programs evaluated. Information geared towards municipalities - rather than towards non-profits, as traditionally done - on grant writing skills would also likely be a welcome addition.

Training Recommendations - Developing the HLI Public Education Initiative

As part of the partnership between DCR, BRV and Q-S, a public education initiative will be developed to help introduce communities to the many tools discussed above that can assist with heritage landscape protection, and how they can be implemented and effectively utilized. The program(s) developed as part of this partnership will serve as a model for the development of future training initiatives.

Education and training efforts will focus upon those tools that are being used the least in this region, as noted above, and that have the capacity to address the issues that these communities are facing that are also already identified as being of high concern. Regional coordination will be stressed and promoted throughout all workshops developed.

The development of this training program will begin after the communities have been selected for participation in the reconnaissance survey, to make sure that it is geared towards assisting the participating communities. Participants will be surveyed to get feedback on what topics they are most interested in, and the team developing the training will also spend sometime in the communities to confirm that the information that has been pulled together so far is relevant when applied on the ground. The rest of the initiative will be developed to meet the logistical needs that have been defined below:

Goals and Objectives of Training:

Development of a training program that addresses planning needs within the BRV and Q-S region that:

- a) can be used to further raise awareness about heritage landscapes and the tools that can be used to protect them
- b) positions communities to recognize threats to landscapes and be proactive about getting tools in place to help counter those threats
- c) insures that communities that have participated in the HLI have the knowledge to implement the recommendations of the Reconnaissance Reports
- d) provides education that is not being met by existing training opportunities

Target Audiences:

- Boards of Selectmen/Chief Elected Officials
- Volunteer boards and committees, with a particular focus on the local historical commissions, open space committees and planning boards
- Municipal Administration/Staff (e.g., DPW, Parks & Recreation, Tree Wardens, Town Planners, etc.)

Assumed level of knowledge: *Beginner to Intermediate*

The audience will likely have a basic awareness of these tools, but may not realize their potential application to landscape preservation.

Training Format

- Training sessions will be clear, concise and open to the public, but geared toward small groups, allowing ample opportunity for Q&A.
- Trainings will be designed so that they may be presented independently or as part of larger workshops.
- Trainings will be prepared in Power Point so that they may be used in sessions and easily made available online.
- A detailed handbook will be developed, which includes case studies and contact information for pertinent agencies and organizations, and made available at training sessions and online. Case studies will include successes and failures, as well as examples of landscapes that are

vulnerable but not imminently threatened. A shorter companion piece, possibly an addition to the *Terra Firma* series, might also result from this work.

Given that many of these tools can be used in conjunction with each other, and/or have similar objectives, there are two approaches that can be taken.

- Grouping like tools with like tools and develop one training session that addresses all of them – e.g., Downtown Revitalization and Village Center Zoning, OR
- Develop sessions that address these from an issue by issue perspective, presenting those tools that are most applicable – e.g., have a session on mill revitalization that begins with some info on why mills are significant and what they contribute to community character, moves on to discuss the challenges mill rehabs present and goes on to discuss helpful tools, including Adaptive Reuse Overlays, Community Preservation Act, Smart Growth Zoning, Village Center Zoning

Further discussion with community members, BRV, QSHC and the two RPAs, to obtain their collective views on the pros and cons of each approach will direct which path is taken. Future work with communities in the region will further inform those tools that are prioritized for the development of workshops.

Appendix A

State, Regional and Local Entities

Heritage landscapes encompass a wide variety of natural and cultural resources, and any protection efforts can – and in fact, should - involve a wide variety of municipal departments, boards and committees as well as some local non-profits actively working together. Following is a list of some of the most common land use entities that can work to protect heritage landscapes and other character defining features of communities.

State Entity	How they can help to protect heritage landscapes
Department of Agricultural Resources	Provides technical assistance to communities on the formation of Local Agricultural Commissions and Right to Farm bylaws. Also manages the Agricultural preservation restriction Program and the Farm Viability program.
Department of Conservation & Recreation	Manages the Heritage Landscape Inventory program as well as the ACEC program, and provides technical assistance to communities.
Executive Office of Environmental Affairs	EOEA provides planning information, most prominently the Smart Growth Toolkit; technical assistance in the form of staff willing to travel to the region to help communities; and funding via the Smart Growth Grant Program to hire professional planners to assist communities in drafting bylaws or ordinances to protect local resources.
Massachusetts Historical Commission	Oversees the Massachusetts Preservation projects Fund and provides technical preservation planning assistance to communities.
Regional Entity	How they can help to protect heritage landscapes
National Heritage Corridors (NHC)	National Heritage Corridors or Areas provide technical assistance, programming and grant funds to communities in an effort to assist in the protection of cultural resources in the region.
Regional Land Trust	Non-profit entities committed to open space protection through land acquisition and holding Conservation Restrictions.
Regional Planning Agency (RPA)	Regional Planning Agencies provide technical planning services and guidance to communities and maintain GIS mapping capabilities. The two RPAs that cover this region are the Central Massachusetts Regional Planning Commission and the Pioneer Valley Planning Commission.
Watershed groups	Non-profit entities that are committed to the protection of

	open space and wetlands within watersheds, as well as rivers and ponds.
Local Entity	How they can help to protect heritage landscapes
Board of Selectman/Chief Elected Official	Allocation of funds for projects or acquisition; support for initiatives or bylaws that have to be passed through town meeting. Depending upon the governmental structure of each municipality, town meeting members and city councilors also play key political support and voting roles.
Cemetery Commission	Assistance in the proper care and maintenance of historic cemeteries.
Chamber of Commerce/Local Business organizations	Financial support for small projects that help promote the community, political support for initiatives or bylaws that need to pass through town meeting. Especially interested in downtown/village center projects.
Community Preservation Committee	Provides financial support, as provided through the Community Preservation Act, for historic preservation and open space protection.
Conservation Commission	Regulatory support for the protection of wetlands; assist in the protection of open space; hold and monitor Conservation Restrictions.
Department of Public Works	Care and maintenance of public parks, cemeteries and scenic roads.
Harbormaster	Involved in waterfront access and harbor planning initiatives.
Local Agricultural Commission	Encouraging the pursuit of agriculture, promotes agriculture-based economic opportunities and works to protect and sustain agricultural businesses and farmland. In June 2006, 89 communities in Massachusetts had formed LAC's, and 12 to 20 more communities will be voting on establishing them at their fall 2006 town meetings – none of them is in this region.
Local Historic District Commission	Administers local historic districts, reviewing any proposed exterior changes to a building that are viewable from a public way.
Local Historical Commission	Responsible for communitywide historic preservation planning. Duties include maintaining the townwide cultural resource survey; administers demolition delay bylaws; provide local input on projects that are being reviewed under Chapter 254 and Section 106.

Local Land Trust	Non-profit entities committed to open space protection through land acquisition and holding Conservation Restrictions.
Open Space Committee	Helps plan for the protection of open space and promotes the appropriate maintenance of municipally owned open space; often works with Conservation Commissions and Land Trusts to help protect land.
Planning Department, Planning Board, and any subcommittees	Works with municipal entities to develop, pass, and administer bylaws and ordinances that help to regulate land use; develops community planning documents and works towards implementing them.
Rights of Way Committee	Maintains public rights of way, making sure that there is public access to natural resources that are important to a community – found mostly in coastal communities.
Trails Committee	Promotes and maintains trails on municipal land within a community, advocates for the protection of land for public access to and enjoyment of nature.
Tree Warden	Involved in the care and maintenance of trees on municipal property, and trees that are within the public way; involved in the administration of scenic roads bylaws.