

Summary Page

The meeting, held on February 14, 2024, was chaired by Ryan Curley, and attended by representatives from Fuss & O'Neill, Peregrine Partners, Union, and community planners. Here's a detailed summary:

Introduction and Roles: Ryan Curley introduced the Town Committee and delineated the roles of the attendees. Kevin Sullivan led the Fuss & O'Neill team, with each participant's responsibilities outlined.

Questions Review: Arnold explained the team's approach to handling questions in this interview. The firm highlighted Nina Morelli as the primary point of contact. Arnold stressed collaboration and shared experiences to inspire community connection.

Experience and Collaboration: The firm(s) discussed their collaborative experiences, emphasizing strengths in affordable housing and community development. Specific projects were cited, highlighting expertise and relevant capabilities.

Similar Projects and Challenges: Each firm discussed past projects similar to Maurice's, focusing on scale, unit mix, and community engagement. Challenges like traffic and neighborhood buffering were acknowledged, some early strategies proposed. More studying would be required.

Engagement Efforts: Strategies for inclusive community engagement were discussed, emphasizing transparency and proactive communication to address concerns and garner support.

Lessons Learned and Excitement: The Firms shared lessons from past projects and expressed enthusiasm for addressing Wellfleet's affordable housing crisis. They highlighted the importance of proactive engagement and effective decision-making.

When asked the firm about the Role of Planning Committee: The firm(s) shared that the Maurice's planning committee's role in their view is fostering community involvement and support was emphasized, with a focus on engagement strategies and decision-making processes.

In a committee discussion after the firm dropped the call, the Committee continued the call to review.

Evaluation and Next Steps: The meeting concluded with discussions on evaluating firms, scheduling future meetings, and ensuring clarity in the selection process. Specific steps for evaluating and ranking firms were outlined, ensuring a thorough and transparent process moving forward.

- **Concerns about Nina's Absence:** Some participants expressed concern about Nina Morelli's absence and the implications for project management. There was a feeling that her presence was crucial, especially given her expertise and role as the primary point of contact.
- **Kevin Sullivan's Level of Involvement:** There were discussions about Kevin Sullivan's role as the principal in charge and concerns that he might be too hands-off. Some participants felt that his level of involvement was not sufficient, considering the importance of the project.

Overall, the meeting was characterized by detailed discussions on project goals, collaborative experiences, and strategies for effective community engagement and development. However, concerns were raised regarding Nina's absence and Kevin Sullivan's level of involvement, highlighting the need for careful consideration moving forward.

Maurice's Planning committee

Friday February 14, 2024, pm
Fuss & O'Neill

Attendees: Ryan Curley(ch), Jan Plaue, Sharon Rule Agger, Gary Sorkin, Farrukh Najmi, Carl Sussman, Emily Achtenberg, Roland Blair, Heather Doyle.

Guest Kevin Sullivan (principal for this project, VP) Eric Busch (Peregrine Partner, SME w finance and development, strategy) Arnold Robinson (community planner), Jeremy Lake(Union, lead community design efforts), Jamie Bratt (Land use development strategist & community strategist, Kevin, McGarry (Fuss & Oneil, community development group), Paul Atteman (affordable housing SME @ Union), Matt Abraham (Peregrine project mgr experience from Massachusetts based affordable housing industry).
Nina Morelli (absent),

Notes from Executive Session 14 February 2024

Ryan conducted introductions on the Town Committee. Fuss & O'Neill team lead by Kevin leads introductions and roles on the candidate side. (summarized above)

Questions Review – Questions in advance first. Arnold explained how the team will interact, including how they will respond to questions. Shared some experiences where someone on the team has worked with others before. Inspired to connect with a neighborhood. Fuss may not answer all questions may default to Union, Peregrine.

Carl asked for a talk on questions.

- 1 Primary point of contact. Will be Nina Morelli -day to day and single point of contact. May see other people in other phases. (community engagement maybe more Arnold for example) Nina is the central contact, receiver and clearing house.
- 2 Division of responsibilities
Kevin shared, the principal is the coach and PM is the quarterback. Principal (Kevin) assures all the team have what they need to have a win and be successful. In terms of the percentage of Principal's and PM time to be spent on this project. The principal is probably 5% and the project manager is more in the 25% of their time each week.
- 3 Describe team's experience of inter- firm collaboration (with the 3 firms)
Arnold shared the matrix in the proposal. Fuss and O'Neill have had strength in the past 5 years on affordable housing projects and new neighborhood development and reviewed projects from the proposal. The larger ones which are closer match are more neighborhood projects are 40-50 units, One Park Home phases 3- 5. Call for massive planning of an old NAVY housing complex and planning that neighborhood also a lot of interaction w Eric and his team *** (as explained by lead by Paul, then Eric here in this call). Many had local contention as well. Eric elaborates quite a bit of exp w Union, and they were an on-call consultant to Mass Housing (Tremont, Sandwich, etc) repositioning parcels. Mixes income, house, retail in RI and Mashpee consultant project for about 10 years. Most appropriate match is the Provincetown project, mixed of mid/lower income. Had to engage abutters quite a bit.

Kevin shared despite being an EE (electrical engineer) he has had experience and an enthusiastic respect for these neighborhood projects and finds them rewarding.

As to Nina's role (per Kevin M) - Out on leave but returning next week and **will manage the project**. She has experience in planning and through to construction. This included the community outreach as mentioned above in Provincetown. She has served an appropriate role over her 13 years of experience in the past. Nina was selected for this project as she could even help with further stages of the projects (As Bourne Massachusetts is her home) She understands needs for housing etc vs housing outside of Cape Cod in State of MA. She is a highly skilled expert in collaboration and extremely organized. The vision is for Nina to leverage Kevin M (as community development group leader for Eastern Mass) to assure the project is successful. Kevin Sullivan will provide oversight.

The Fuss and O'Neill approach is to empower project managers, clearly identify task managers, (Arnold planning, Jeremy, Paul from Union & Matt from Peregrine.) Nina is the continuity to bring in experts as needed (permitting, wastewater, climate, traffic etc)

Question 4 & 5 will collect those on paper vs on voice call.

Carl shared that we are targeting the affordable housing crisis in Wellfleet. How have past projects similar in terms of Scale, content, mix of units and why are they similar in your view. Arnold shares that Palmer Point was similar in terms of side-by-side neighbor constraints, less dense neighbors, number of bedrooms, how sets off main road, how to maximize yield, but keep character make this similar to the Maurices project.

Arnold raises a point, a question to the team as that the residents of the town are key to help in this early (raising Capitol) phase to help meet a broad range of needs, and of incomes. (As in Workforce Housing, not AMI guideline etc.) community support will be impactful.

North Eastham and Governor Prence are also raised as similar projects by Jeremy. Towns aspire to a mix of housing and affordability. Explore tax credits, for example, how to create affordable homes for plumbers as well as the workforce. In that case Habitat also helped target workforce as a partner on the project for solving for that at Governor Prence. The North Eastham project is not ready for the RFP, but the town is preparing to help explore bringing in town funds to fill gap and workforce housing but need support from the townspeople to go that direction. Eric was involved there in North Eastham as well. (will market rate offset the funded units...). Does the current market rate help this model, explore taxes, other programs in planning efforts. Yet, TBD. Their approach is to have a running gut check for financing as running the models in the master plan.

Arnold likes to use that aspect in the community feedback aspect too as it gives transparency and helps get to mutual agreeable decisions based on all constraints and financial implications. (don't design w/ out understanding associated costs)

Emily redirects to bring talk back to a compared to Maurices. From Peregrin, 40B at Mashpee Commons was similar, Down City Providence, RI. These and others brought lessons on how to work w taxes, creative sources to fill gaps seen at 80 % Ami , others were mentioned as well. In particular Union and Peregrine are working together in Connecticut to build a solution to a town owned Farm. Add housing and community space. (mission driven, affordable and market rate for neurodiverse adults)

Next question

Please talk about thoughts on how to create a denser neighborhood than we have had in the past that fits into character and community. Jeremy shares a strategy to rely on historical designs. In generations passed, there were old structures but housed 6-12 units. Visually it is still beautiful and walk-able. Bring people visuals to accept the vision in the planning phase. Also be mindful of the close abutter neighborhood view/as they pass by. Less dense in the outer proximity. Use transitions and building types to make it easier to accept.

Paul has 2 on the Vineyard where housing is a challenge. Island housing Trust helping and using small footprint types, 6-8 units nicely laid out w. community space and feels neighbor not apartment like

A last question

If you want to elaborate, we are looking to deal with buffering adjacent neighborhoods and traffic. Any early ideas? Jeremy and Arnold share buffering is a tough conversation. Must have conversations and awareness. Traffic is not addressed easily unless the project provides/ gives attractive alternatives (i.e., bus) inform a detailed alternative plan and emphasis bike paths. Create inviting spaces to attract use to these alternatives as a first idea that they have seen work elsewhere (and is a goal in North Eastham too). Could a commercial element help offset the need to leave the neighborhood (i.e., neighborhood stores.)

Arnold shares more in traffic, need volume and trip generation data, traffic on turns study is done – don't know alternatives to drive decision tree. Add to community discussion.

Emily raises a task related to transportation affect at the RFP response. Arnold said it was addressed and needs data to move forward. Carl asked them how to create a sense of community. Including neighbors?

This has come up (a community place) Jeremy has experience making things feel welcoming, open to the broader public etc. Make this walkable and welcoming, not just parking lot w associated a building. Need more collaboration. Hard to be sure at this early phase. Arnold would suggest we have a documentation of ALL alternatives to consider positives and negatives. (they share visuals and impact)

Thoughts on unconventional housing types? (seasonal workers, affordable home ownership) How would Peregrine investigate feasibility as they are probably not eligible for fundings? Eric chimed in to share there is no magic bullet. Need the models, align the costs to make it doable, i.e., do business owners, own buildings for their workers as a far-out idea. Jeremy might explore how universities can share their housing to off season vs on season working. How to chip away at the gap once can quantify the programs and impacts. Too early at this phase. He has experience drawing on many sources as they had some needs for the Eastham project (seasonal worker housing funding sources but they are not fully formed at this time) Arnold knows people to draw on from the West coast working on tiny housing and solving for septic therein. Nothing is off the table; be sure we have explored all to respond to community.

Carl shares there has been affordable housing support but surely some distractors and concerns. What is your engagement effort to be inclusive and assure projects are not derailed.

Arnold shared his methods to avoid surprises. Wide share of data, in advance, in consumable way, avoid a gap which allows for misinformation. (digital or in person) Also at the first few events, station based, not an audience at a microphone. (disaster). Stations allow for small detail conversations. (success recently at Bridgewater) This was set up as many small tables by topic. Yielded great outcomes, a lesson learned. Any session set forth rules of engagement for all participants mutual accountability not just owned by the facilitators.

From the chat –

- Nina Morelli – what is her PM exp w. municipal and master planning efforts? Arnold said Bristol RI it was a complete streets project. High community input on that one and also Kevin M worked w Nina on the Ptown project and issues w abutters. Nina met and heard the concerns and owned plan to mitigate and communicate.
- How were small projects funded in the Vineyard? Paul? Financed w Mass State housing (MA Community development and housing) these are low-income housing tax credits.

Back to Emily

Unexpected challenges, please share. Hard lessons you bring forth from that experience. Arnold shares when changed political leadership in a client community. Vision was solid, became at risk after an election and change in city council. They know now how to re-engage and re-educate to keep all on board. Though, some things cannot be controlled. Show respect and take on head-to-head (re) engagement tasks even if hard conversations, or difficult. Must also have a strong partner at the client level.

Jamie also feels experienced in this space. Sometimes even if all lights are green hit obstacles like zoning It is impressive that Wellfleet is already writing progressive changes to zoning in recent years. Also, town staff engagement they need to be informed and on-board w any coordination.

Eric shares a master plan some years ago on a vacant college campus. Town owned, bought by a developer wanted to add age restricted cottages and age restricted units. In that case, misinformation and due to zoning concerns started to derail. In order to remediate the team went out where people were on a weekend, advertised their availability to answer questions, provide clarity and removed conjecture. Diffused issues and master plan were approved.

Carl asked the team why they would be excited. They appreciate the town is behind this. Space was acquired, wastewater is under examine, the need is so dire and clear. Wellfleet are moving from talk to action and creating a continuum. Brings the talents of this group to solve the issue using their particular talents in one plan. The future developer will have a solid plan.

How can the planning committee be of assistance? Arnold appreciates that we are the best faces of the project. Engagement is at the center, but the consultant cannot stand alone. Help bring people into the process and ALSO the primary voices on design review and decisions.

Ryan raises community engagement. How to assure we collect ALL constituency not just older and or wealthy residents who are the typical voters, participants. Arnold says decide who are under heard, then go to where they are. Make a plan to address those dark spots.

Last thoughts?

Arnold, question. How have prior projects informed how WE think about moving forward? Ryan responded that w. 95 Lawrence. Concerning wastewater (also serving surround areas). We will have a cluster ww treatment, which is an example of something was a concern we carried into Maurices.

Further, others? Carl shared sustainability and environmental issues as heard too by the constituency who came forward for planning (lights at night, net zero etc etc) Gary, "95 Lawrence was always just rental, but Maurices is a neighborhood and a hybrid more of a wider canvas and inclusive. "

Jan offered a goal to continue to foster support in town, but that will come by executing well.

1:30 minute mark

Transition to conversation with only the Maurices Committee.
Other participants dropped from the candidate firm.

Team summarizes to say.

- Very strong members on this team
- Nina should have been on, could have been rescheduled.
- Principal in charge has a high role, too far up, off to the side.
- Arnold would have been a good leader candidate.
- Jeremy also was impressive on this call.
- Peregrine demonstrated more expertise than we thought.
- Too bad Nina wasn't offered another time to talk?
- It was a disadvantage, she was not on (Nina)
- Maybe their philosophy is a big team.
- PM should have been at key interview.
- Impressive Team, more than expected Esp Arnold! Very impressive with the community engagement experience
- Kevin Sullivan too high up, though a team builder, what is his role.
- Liked all members of the 3 teams more than expected from just the RFP.
- Higher impression than Tighe and Bond
- While terrific, what serves the town the best? Nina should have been on. What if she were to come forward and was terrific? Are we jumping too soon to eliminate them?
- Arnold is a high asset and Peregrine on the finance causes conflict to potentially lose the opportunity to have those assets on this project.
- The "leave "(Ninas leave) should have been explained, was not addressed adequately. Is this indicative of how they see the role? Causes worry. What could they have done, should we be the ones to chase that up? It was omitted.
- Do we want to have a follow on to meet Nina? If not, why?
- The SMEs that were on the call were excellent and impressive.
- Could the town negotiate for another PM and appreciate the expertise of the people on the call today?
- While the expertise was there, was there a particular passion for the project.
- A small team is a benefit vs all the members on a big team like this.
- What would we do if we had 2 strong candidates? – **We need to do the scoring though.**
- At this time Tighe and Bond maybe omitted, but we still need to score them? Check references?
- Need clarity if we must score 2 or all 3 on the comparative criteria, we need all 3 scored maybe don't check ref on Tighe and Bond. We should have a backup in case the price proposals cause us to rely on the scoring.

- We will check references on the top one or two.
- The team talked about scoring 1vs 2, 3vs4, 5vs 6 so that we have the same understanding of the team.
- Reviewed the common score sheet that was made up.
- The team went on to talk about schedule going forward, must rank all firms for meeting next week. 21st. Price proposal should be opened on 22nd.

Motion to adjourn, 2nd -all in favor -
Adjourn ended the call at 2hours and 13 minutes.