

Town of Palm Beach Project for Code Reform Project Brief and Proposed Work Plan

Revised Final Draft date: November 6, 2019

The Town of Palm Beach seeks to reform its conventional zoning code. In addition to being based on outdated auto-centric land use patterns, the current code is also unmanageable due to extensive, contradicting standards and special district conditions added over the past several decades.

Most existing zoning codes, including that of Palm Beach, were written to guide the post-war housing boom. While these codes were able to accommodate unprecedented growth, many had unintentional consequences that hampered the ability to develop more of the walkable, vibrant streets and neighborhoods that were the historic hearts of many villages and cities. In Palm Beach, it is illegal in the Town's zoning code to build a replica of a beloved building or neighborhood of Historic Palm Beach. Furthermore, the process of updating a code can be expensive and time consuming, requiring significant municipal capacity.

In devising a work plan for the Code Reform Project, Josh Martin, Director of Planning, Zoning, and Building spent nearly a year meeting with residents, business owners, and other stakeholders to ensure that the Town of Palm Beach would experience the most bespoke code reform process in the country—one that had not been experienced before, as the Town of Palm Beach deserves an inimitable approach to zoning code reform given its inimitable built environment.

As a result, the following four pillars of the code reform project became apparent:

- **Research:** The Town of Palm Beach deserves to be equipped with leading research from a leading institution/think tank regarding all facets of zoning code reform;
- **Education:** Once the research of best practices of code reform has been completed, international leading experts in the subject areas of code reform shall participate in a number of symposiums in Palm Beach to reflect on the research at hand as well as their prominent and respected experience in the respective subject matter. The proposed subject areas will as a result include a comprehensive review of the entire, existing Town of Palm Beach Zoning Code;
- **Transparency:** The code reform process should be discussed, deliberated, and composed in the public and by the public. Therefore, following each symposium, a community feedback session will be conducted to reflect and comment on the information that was transmitted to the Town; and
- **Incremental Code Reform:** Following the research, education, and community feedback loops, proposed "incremental" code reform (for each subject area) will be drafted and again considered via community feedback sessions in a series of public venues.

In 2016, the Congress for the New Urbanism (CNU -- CNU is a nonprofit 501(c)(3) organization headquartered in Washington, DC) launched the Project for Code Reform to streamline the code reform process by providing local governments with place-specific incremental coding changes that address the most problematic barriers first, build political will, and ultimately create more walkable, prosperous, and equitable places. While the reform strategies developed through the project have been met with widespread support, an opportunity to fully demonstrate the systemic implementation of incremental reform would provide key learnings for the project and illustrate a front-to-back strategy that other communities could model.

As a result, CNU now seeks to leverage the Project for Code Reform by partnering with the Town of Palm Beach, with the ultimate goal to comprehensively analyze the full extent of regulations that can inhibit the placemaking, historic preservation, and historic form promotion strategies that have a demonstrated track record of increasing financial performance, preserving and revitalizing historic commercial corridors, protecting the environment, and helping to create more equitable communities. As a byproduct of this research, CNU will then empower expert code-writing members to draft an orderly, incremental but comprehensive code reform process based on current research, best practice, and community context, delivered with significant public education and engagement. The outcome will be a radically simplified town-wide zoning code, easily understood and fully integrated across all land use regulations.

CNU is proposing a five-step process for implementing this project, which will be implemented through six categories of research. The five-step process includes:

- Analysis of existing code elements across all land use regulations,
- Research into existing federal and state regulations that impact local development,
- A half-day symposium led by national experts on critical coding considerations and town building principles,
- A half day public engagement exercise following each symposium, and
- Provision of recommended code changes (or language for new land use regulations) that incorporates all of the above.

The five categories of land use regulatory research through which this process will be delivered include:

- The History, Theory and Practice of Land Use Codes
 - Speaker 1: (Leading Expert in Urban Design)
 - Speaker 2: (Leading Academic in Planning History)
- Place, Form, and Space in the Town of Palm Beach
 - Speaker 1: (Leading Expert in Code Writing)
 - Speaker 2: (Leading Expert in Architecture)
- Vulnerability Analysis and Design & Regulation for Resiliency
 - Speaker 1: (Leading Expert in Sustainability)
 - Speaker 2: (Leading Expert in Resiliency)
 - Speaker 3: (Leading Expert in Climate-Responsive Design)
- Complete Streets, Retail Trends, and Parking Resource Management
 - Speaker 1: (Leading Expert in Retail)
 - Speaker 2: (Leading Expert in Transportation)

- The Power of Good Design in Coding Urban Outcomes
 - Speaker 1: (Leading Expert in Urban Design)
 - Speaker 2: (Leading Expert in Public Health)
 - Speaker 3: (Leading Expert in Architectural Design)

Prior to the launch of the project, a preliminary symposium and corresponding community listening session focused on the Historic District will be conducted (scheduled: December 4-5), responding to the immediate needs of the Town and allowing for this major area of research to begin immediately.

With the results of the Historic District research, symposium, and feedback, taken together with these five identified additional categories of research, all major factors mitigating the built outcomes of the Palm Beach zoning code will be researched and analyzed, and specific coding recommendations will be developed. At the completion of the process, these coding recommendations will be compiled into a completely reformed zoning code for the Town.

A town-wide incremental zoning overhaul this systemic has never been done in the U.S. By breaking the process and the analysis into incremental phases, and educating the public on the essential elements of land use regulations and state requirements, CNU believes the result will deliver a code reform process that is replicable in other cities and towns in the U.S. A partnership between CNU and the Town of Palm Beach will not only provide the Town with a newly reformed code, it will also provide CNU with insights on the incremental code reform process: what works, what doesn't, and how it can be replicated in other places.

PROPOSED WORKPLAN

Task 1 - Kickoff & Research: *Identify the Needs for Code Reform in Palm Beach*

In order to fully understand the breadth and depth of the code reform needs in the Town of Palm Beach, a formal project launch and thorough background of research is necessary. CNU will lead a Kickoff meeting with Town elected officials, staff, and stakeholder group representatives to launch the project, explain the incremental code reform process, and solicit feedback and facilitate a dialogue on the common zoning obstacles. Additionally, CNU will conduct an analysis of the land use regulations across the 5 identified categories of research that are contributing to the challenges of placemaking in the Town of Palm Beach, identified the major obstacles to be addressed through the code reform process.

Strategy: Kickoff Meeting and Research Papers on Land Use Regulatory Themes

Objective: Analyze existing regulatory obstacles to best practice placemaking strategies across 5 identified categories of research

Primary Team Members: CNU (Mallory Baches, Avery Kelly), Researcher (Bruce Donelley)

Secondary Team Members: CNU (Lynn Richards), Code Experts (Matt Lambert, Marina Khoury)

Sub-tasks:

- Kick-off meeting with Town of Palm Beach and Project Team to cement scope, confirm approach, and engage local departmental partners in process of project
- Research of relevant local, state, and federal regulations on land use
- Distillation of research into major placemaking-inhibiting obstacles
- Delivery of research in an easy to read, annotated document suitable for publication

Deliverables:

- 5 @ 3-5-page reports on each of the identified categories of research
- Preparation work associated with each research paper
- Design/layout work associated with each research paper

Task 2 - Symposium Series: *Link Code Reform to Stakeholder Interests and Address Community Concerns*

In order to engage and ground the Palm Beach community in the need for, implications of, and considerations associated with the incremental code reform process, CNU will facilitate individual symposia focused on the five (5) identified categories of land use regulation research. To deliver this public education, CNU will leverage the expertise of nationally-recognized experts in fields critically associated with zoning, including: architecture, urban design, planning, historic preservation, landscape, sustainability, resiliency, transportation, commercial development, housing, and public health. Additionally, CNU will facilitate community listening sessions in conjunction with each symposium, to gauge concerns and solicit feedback on the subject.

Strategy: Organization and Execution of Symposium Series

Objective: In incremental phases, provide public educational grounding, fostered by national industry experts speaking on the primary land use regulatory themes impacting the Town of Palm Beach

Primary Team Members: CNU (Mallory Baches, Tracy Cooper)

Secondary Team Members: CNU (Lynn Richards), Code Experts (Matt Lambert, Marina Khoury)

Sub-tasks:

- Coordinate with speakers on preparation for presentations
- Collaborate with Town of Palm Beach on outreach for series
- Record and publish presentations online
- Facilitate public listening sessions following each presentation
- Record and document community feedback

Deliverables:

- 5 @ 2-day site visits for symposium series
- Preparation work associated with each site visit
- Documentation/publication work associated with each site visit

Symposium Series Schedule			
February 6	Symposium 1: History of Codes/Code Theory/Zoning Codes Best Practices	Leading Expert in Urban Design / Leading Academic in Planning History Lynn Richards Mallory Baches Marina Khoury	Organizational Approach, Short Term vs Long Term Fixes, Vision for Code
February 20	Symposium 2: Place Types, Form, Height/Scale/Mass, Landscape, Open Space	Leading Expert in Code Writing / Leading Expert in Architecture Mallory Baches Marina Khoury	Architectural Standards, Height Districts, Frontage Types, Composition Adjacency Requirements, Transition Principles, Use/Form
March 5	Symposium 3: Vulnerability Analysis, FEMA Regulation, Local Regulations, Disaster Regulations, Design	Leading Expert in Sustainability / Leading Expert in Resiliency / Leading Expert in Climate-Responsive Design Mallory Baches Marina Khoury	FEMA Design Strategies, Sustainability Strategies, Stormwater Strategies
March 19	Symposium 4: Retail + Parking + Transportation (Complete Streets)	Leading Expert in Retail / Leading Expert in Transportation Mallory Baches Marina Khoury	Retail Strategy (Main Street District), Parking Standards and Management Strategy, Transportation and Streetscape Network

April 2	Symposium 5: Inclusive Mobility/Public Health/the Power of Good Design	Leading Expert in Urban Design / Leading Expert in Public Health / Leading Expert in Architectural Design Lynn Richards Mallory Baches Marina Khoury	Urban Standards, Lot Coverage, Frontage Buildout, Additional Requirements and Guidelines, Sign Standards
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Task 3 - Workshop: Determine Place Types, Map the Municipality, and Draft Code Reform Framework

CNU will lead a five-day workshop, where the team will work directly with Town staff to learn about the most prevalent planning and zoning obstacles to livable, walkable placemaking specific to the needs and concerns of the Town of Palm Beach. The team will determine the place types and context zones present in Palm Beach, map the municipality based on these place types and context zones, and develop protection and/or enhancement goals for each. The outcome of the workshop will be a Code Reform Framework, which the team will use as a tool when compiling the specific replacement code elements for each place type in Palm Beach, based on the five (5) identified categories of land use regulation.

Strategy: Incremental Coding Workshop

Objective: Utilizing background research on existing regulations, Determine Place Types and Map Municipality in order to draft corresponding Code Reform Framework, outlining the structure for delivering replacement code elements based on land use regulatory themes

Primary Team Members: CNU (Lynn Richards, Mallory Baches), Code Experts (Matt Lambert, Marina Khoury), Renderer (DPZ CoDesign)

Sub-tasks:

- Determination of place types
- Mapping of districts
- Building of code reform framework
- Preliminary structuring of replacement code elements
- Illustrating of common existing code conditions, as needed

Deliverables:

- 1 @ 1-week workshop to analyze existing code and propose conceptual recommendations
- Preparation work associated with planning workshop
- Draft framework for revised code elements
- Illustrations associated with code conditions

Background Base Mapping needed from Town of Palm Beach:

- Existing Building Types/Lot Types/District Types documentation
- Synoptic Survey results

Task 4 - Code Elements Framework: *Deliver, Review, and Adopt Replacement Code Elements*

Utilizing the Code Reform Framework created during the five-day workshop, the team will develop specific incremental land use regulation changes for each place type within the Town of Palm Beach. The resulting place-specific strategies will identify the incremental reform that Palm Beach should implement in each of the critical coding areas. CNU will facilitate the delivery of these replacement code elements, in incremental phases based on the five (5) identified categories of land use regulation and in conjunction with each of the five (5) symposia, to the Town of Palm Beach for review and adoption.

Strategy: Code Element Drafting, Listening Sessions and Review, Code Element Refinement, and Incremental Adoption

Objective: Deliver replacement code elements with precise code text and corresponding diagrams, inserted into draft code reform framework incrementally with the subject matter and phasing of 6 symposiums, to be reviewed to ensure they respond to the zoning reform challenges facing the Town of Palm Beach and are easily implemented, in preparation for refinement and incremental adoption

Primary Team Members: Code Experts (Matt Lambert, Marina Khoury)

Secondary Team Members: CNU (Lynn Richards, Mallory Baches)

Sub-tasks:

- For each land use regulatory theme, draft recommended replacement code elements and insert into code reform framework
 - Incorporate review/ground truthing by Town of Palm Beach and stakeholders
 - Incorporate community feedback based on listening sessions
- Refine recommended code elements as necessary
- Publish recommended code elements
- Facilitate adoption of recommended code elements

Deliverables:

- 5 @ reviewed individual land use regulatory-thematic sets of recommended code elements

Task 5 - Code Documents Creation: *Layout Document Structure and Design Individual Code Deliverables*

CNU will design and layout an overall document structure, within which to embed each of the 5 sets of specific incremental land use regulation changes for each place type developed by the team as well as any related guidance materials necessary. The layout will be designed with the goal of creating a user-friendly document that breaks down complicated information so that it is easily understood and more accessible to non-planning professionals, as well as easily applied and administered by the Town of Palm Beach staff.

Strategy: Create a Comprehensive Community Code Document

Objective: Provide a simple organizing structure and incrementally embed strong, easy-to-understand code deliverables, as will be essential for the Town of Palm Beach to use the complete document and adopt the individual sets of recommendations embedded within

Primary Team Members: CNU (Mallory Baches), Renderer (DPZ CoDesign), document designer

Secondary Team Members: Code Experts (Matt Lambert, Marina Khoury)

Sub-tasks:

- Acquire images from Team and Town of Palm Beach, as needed
- Develop iconography/graphics/diagrams necessary for clearly conveying individual sets of replacement code elements
- Layout of document structure
- Embedding of replacement code elements
- Illustrating of common replacement code conditions, as needed
- Draft review of each set of code deliverables by Town of Palm Beach
- Finalization of each set of code deliverables

Deliverables:

- 5 @ fully formatted draft/final code documents for review by Town of Palm Beach

Task 6 - Final Report and Analysis: *Draft Summary Report of Incremental Code Reform Process and Final Coding Results*

CNU will lead a review workshop with the team, in order to analyze the project and provide a final reporting document that summarizes the research and specific incremental code reform of the 6 identified categories of land use regulation and for each Palm Beach place type, based on the learnings from the 5-day workshop, the review of the replacement code elements, and the feedback from the community listening sessions. The layout will be designed to provide an easy-to-read document that fully summarizes the code reform process and products delivered to the Town of Palm Beach. CNU will then work with the Town to facilitate outreach and communication of the final report to the audiences of both CNU nationally and the Town of Palm Beach locally.

Strategy: Review Workshop to Compile Research and Replacement Code Elements into Final Findings Report

Objective: Compile the research and product developed through the Incremental Code Reform Process and Model Comprehensive Community Code delivered to the Town of Palm Beach through this project into a final findings report suitable for publication and distribution

Primary Team Members: CNU (Lynn Richards, Mallory Baches, Lisa Schames), document designer

Secondary Team Members: Code Experts (Matt Lambert, Marina Khoury)

Sub-tasks:

- Compile and analyze the process and products derived from the project
- Summarize and provide analysis of code elements delivered to Palm Beach
- Design and layout of report
- Outreach and communication of final report

Deliverables:

- 1 @ 1-week workshop to compile and synthesize research and findings, analyze code documents, and draft final report framework
- Preparation work associated with planning workshop
- 1 @ fully formatted final report documenting process/product
- Preparation work associated with final report
- Design/layout work associated with final report

Task 7 - Conclusion: *Draft Findings Document of Incremental Code Reform Implementation*

CNU will develop a findings document that synthesizes the process and products developed for the Town of Palm Beach project, to determine lessons learned and identify areas for further research relevant to the implementation of a complete incremental code reform process. CNU will work with the Town to review the project and identify examples of best practices and opportunities for improvement, and will compile strategies for systematizing response to both. CNU will then draft a reference manual for communities to refer to when implementing their own Incremental Code Reform process.

Strategy: Create an Incremental Code Reform Manual

Objective: Synthesize the outcomes developed through CNU's facilitation of a complete Incremental Code Reform Process into a findings document illustrating how other cities can replicate the process implemented in the Town of Palm Beach.

Primary Team Members: CNU (Lynn Richards, Mallory Baches, Lisa Schames), document designer

Sub-tasks:

- Synthesize the complete research content executed through the project
- Design and layout of guide
- Outreach and communication of guide

Deliverables:

- 1 @ fully formatted findings document for broader audience
- Preparation work associated with findings document
- Design/layout work associated with findings document

PROPOSED TEAM

Research Team:

- Lynn Richards, CNU (face of project)
- Mallory Baches, CNU (PM)
- Support staff
 - Bruce Donnelly, Access Places (researcher)
 - Avery Kelly, CNU (research assistant)
 - Tracy Cooper, CNU (logistics coordinator)
 - Lisa Schamess, CNU (communications)

Coding Team:

- Marina Khoury, DPZ CoDesign
- Matt Lambert, DPZ CoDesign
- Renderer: DPZ CoDesign

PROPOSED BUDGET

In order to deliver the previously identified deliverables, the proposed budget shall be \$250,000 plus expenses. The budget needed for this project has already been approved by the current, fiscal year budget via a code reform line item as well as salary savings for a full-time planner position.

Project Deliverables:

- 5 @ 3-5-page reports on each of the identified categories of research
 - Preparation work associated with each research paper
 - Design/layout work associated with each research paper
- 5 @ 2-day site visits for symposium series
 - Preparation work associated with each site visit
 - Documentation/publication work associated with each site visit
- 1 @ 1-week workshop to analyze existing code and propose conceptual recommendations
 - Preparation work associated with planning workshop
 - Draft framework for revised code elements
 - Illustrations associated with code conditions
- 5 @ reviewed individual land use regulatory-thematic sets of recommended code elements
- 1 @ 1-week workshop to compile and synthesize research and findings, analyze code documents, and draft final report framework
 - Preparation work associated with planning workshop
- 1 @ fully formatted final report documenting process/product
 - Preparation work associated with final report
 - Design/layout work associated with final report
- 1 @ fully formatted findings document for broader audience
 - Preparation work associated with findings document
 - Design/layout work associated with findings document

PROPOSED PROJECT TIMELINE (final schedule TBD once project is approved)

January 2020			
January 6	Kickoff Meeting	Project Team: Marina Khoury, Matt Lambert, Mallory Baches, Lynn Richards	
January 6-10	Incremental Coding Workshop: Analysis/Mapping/Base Materials	Project Team: Marina Khoury, Matt Lambert, Mallory Baches, Lynn Richards (Public Engagement)	Synoptic Survey, Place Types, Context Zones, Open Space, Lot Type, Building Types
January 30	Symposium 1 research prep deadline		
February 2020			
February 6	Symposium 1: History of Codes/Code Theory/Zoning Codes Best Practices	Leading Expert in Urban Design / Leading Academic in Planning History Lynn Richards Mallory Baches Marina Khoury	
February 7	Community Feedback Listening Session	Mallory Baches Marina Khoury	
February 13	Symposium 1 code recommendations deadline		
	Symposium 2 research prep deadline		
February 20	Symposium 2: Place Types, Form, Height/Scale/Mass, Landscape, Open Space	Leading Expert in Code Writing / Leading Expert in Architecture Mallory Baches Marina Khoury	History of Palm Beach, Mapping/Synoptic Survey, Transitions, Adjacency Requirements
February 21	Community Feedback Listening Session	Mallory Baches Marina Khoury	
February 27	Symposium 2 code		

	recommendations deadline		
	Symposium 3 research prep deadline		
March 2020			
March 5	Symposium 3: Vulnerability Analysis, FEMA Regulation, Local Regulations, Disaster Regulations, Design	Leading Expert in Sustainability / Leading Expert in Resiliency / Leading Expert in Climate-Responsive Design Mallory Baches Marina Khoury	(ex: elevate historic structure, new infill)
March 6	Community Feedback Listening Session	Mallory Baches Marina Khoury	
March 12	Symposium 3 code recommendations deadline		
	Symposium 4 research prep deadline		
March 19	Symposium 4: Retail + Parking + Transportation (Complete Streets)	Leading Expert in Retail / Leading Expert in Transportation Mallory Baches Marina Khoury	
March 20	Community Feedback Listening Session	Mallory Baches Marina Khoury	
March 26	Symposium 4 code recommendations deadline		
	Symposium 5 research prep deadline		
April 2020			
April 2	Symposium 5: Inclusive Mobility/Public Health/the Power of Good Design	Leading Expert in Urban Design / Leading Expert in Public Health / Leading Expert in Architectural Design Lynn Richards Mallory Baches	

		Marina Khoury	
April 3	Community Feedback Listening Session	Mallory Baches Marina Khoury	
April 9	Symposium 5 code recommendations deadline		
April 20-24	Completion Workshop: Compilation of Research Papers into Final Recommendation Report	Project Team: Marina Khoury, Matt Lambert, Mallory Baches, Lynn Richards (Public Engagement)	
May 2020			
May 14	Draft document delivered		
May 28	Comments received from Town of Palm Beach		
June 2020			
June 5	Final Draft document delivered		

The Congress for the New Urbanism (CNU) is an international non-profit working to build places people love—thriving, prosperous communities where people have diverse choices for how they live, work, shop, and travel. Our mission is to help create more great places. We do this by changing the practices and standards of urban design and development to support healthy regions and diverse, complete neighborhoods.

With nineteen chapters and headquartered in Washington, D.C., CNU works to unite the New Urbanist movement. Our projects and campaigns empower our members' efforts, identify policy opportunities, spread great ideas and innovative work to a national audience, and catalyze new strategies for implementing policy through design approaches.

All New Urbanists share the conviction that our physical environment has a direct impact on our chances for happy, prosperous lives. Our movement includes professionals, leaders, advocates, citizens, and like-minded organizations working to identify and address the range of issues impeding the development and redevelopment of well-designed neighborhoods, public places, commercial corridors, and rural environments.

The Project for Code Reform

Why aren't more cities implementing placemaking strategies, which are proven to expand economic activity, increase mobility, protect the environment, and create more equitable places? In many cases, it's because a municipality's zoning codes and ordinances make it illegal to create the type of vibrant communities that support jobs, foster economic development, and are attractive places for people to live, work, and play that residents and local leaders are seeking.

The challenge before the placemaking movement now is how to bring coding innovations and changes to the 42,000 units of local government with zoning authority. To date, a limited number of cities have updated their codes, creating inequities between cities and towns with—and without—resources to update their zoning codes to create the foundation for diverse, vibrant places.

CNU's Project for Code Reform seeks to streamline the code reform process by providing local governments place-specific incremental coding changes that address the most problematic barriers first, build political will, and ultimately create more walkable, prosperous, and equitable places. And to do it in a way that meets planners, mayors, and planning commissioners where they are: politically, financially, and administratively. The Project's incremental approach allows jurisdictions to set their own pace for code changes, allowing them to prioritize their coding efforts, respond to the community's vision and needs, and allows for greater community learning and understanding.

Lynn A. Richards
President and CEO, Congress for the New Urbanism

EXPERIENCE

CONGRESS FOR THE NEW URBANISM

PRESIDENT AND CEO

2014-PRESENT

I manage all aspects of CNU including strategic planning, fund raising, communications, program development and implementation, and event planning. Under my leadership, with 2600 members, a staff of 10, and a budget of \$1.4M, we are working to strategically address regulatory and administrative barriers to good urbanism in the areas of transportation standards and designs, financing, equity, and environmental issues.

U.S. ENVIRONMENTAL PROTECTION AGENCY, OFFICE OF SUSTAINABLE COMMUNITIES, Washington, D.C.

Senior Policy Analyst—Special Projects

2013-2014

I was responsible for developing tools and policies for state and local government, which are designed to create more places that people love. Tools cover topics such as transportation policy and street design, suburban retrofit, state stormwater standards, and other policies designed to change other state standards.

HARVARD UNIVERSITY GRADUATE SCHOOL OF DESIGN / LINCOLN INSTITUTE OF LAND POLICY

2012 – 2013

Loeb Fellow/ Lincoln-Loeb Fellow

I used my Fellowship year to expand my leadership skills and deepen my technical knowledge on the role of design in community redevelopment efforts, with a particular focus on rescaling suburban environments.

Accomplishments included:

- Researched suburban retrofit strategies, including economic development, environment, transportation, and equity approaches.
- Taught a new January-term course on suburban retrofit and co-taught a semester-length study on a North Hollywood, CA suburban redevelopment and revitalization project.
- Gave guest lectures in a dozen Harvard classes and at eight Boston-based organizations, including two sold-out lectures on suburban retrofit at the Lincoln Institute, and was a studio critic during mid-term and final studio reviews.

U.S. ENVIRONMENTAL PROTECTION AGENCY, OFFICE OF SUSTAINABLE COMMUNITIES, Washington, D.C.

Policy Director

2010- 2013

I was responsible for tracking emerging design and development trends, developing the Office's strategic plan and budget to respond to those trends, and crafting specific policy initiatives to maximize our effectiveness and leverage emerging opportunities. Accomplishments include:

- Worked with approximately four dozen state and local governments to implement placemaking approaches by developing policies, urban design strategies, and environmental solutions for vibrant, prosperous neighborhoods (also did this as senior policy analyst).
- Worked with several EPA offices to: (1) develop standards, policies, and strategies for a national regulation on stormwater management that facilitates downtown revitalization, and (2) incorporate stormwater management into smart growth and green building policies and programs.
- Developed several new community-based technical assistance efforts aimed at providing policy options around common barriers for over 150 communities a year.
- Served on USGBC LEED Locational and Planning Technical Advisory Group.
- Identified internal and external performance metrics.
- Served as high-level spokesperson for EPA and the DOT-HUD-EPA Sustainable Communities Partnership for engagements at the White House, Office of Management and Budget, state and local governments, and other stakeholder meetings and workshops, including defending our budget to OMB and Congress.

Acting Director for EPA's Smart Growth Program

2008-2009, 2010

I managed all aspects of EPA's smart growth and sustainable design work, including managing 17 staff, 50 projects, and a \$7.0M budget. Accomplishments included:

- Worked with external and internal partners to develop smart growth sustainable design policies, strategies, and regulatory requirements, including strengthening and expanding national coalition of smart growth advocates and organizations.
- Developed the Division's 2008-09 strategies plan and budget, including aligning all projects within the Division's 5-year priorities, developing associated performance measures, and maximizing leveraging efforts, e.g., for every \$1 we spent, we leveraged \$8 from other federal, state, or local resources.
- Revised the Division's process for delivering technical assistance to communities to ensure narrower focus, better alignment with the Division's priorities, and compliance with Agency's contracting rules.
- Briefed EPA senior management, OMB, White House staff, and Congressional staff on all aspects of our smart growth and sustainable design program.

Senior Policy Analyst, Smart Growth Program

2000 - 2008

I worked in all aspects of the Smart Growth program, including running the National Award for Smart Growth Achievement (2004), completing research on economic development strategies, managing grants and contracts, giving dozens of presentations every year, and representing the program to internal and external partners and other interested organization. I also led the water and development research, including my groundbreaking research on water and land use strategies. Accomplishments included:

- Changed state stormwater standards in West Virginia and Tennessee.
- Researched land use development patterns and their impact on water quality, which resulted in two major EPA publications: *Protecting Water Resources with Higher Density Development* and *Protecting Water Resources with Smart Growth*.
- Leveraged NOAA Coastal Community Development program to include smart growth issues, developed and gave a week long training Sea Grant extension agents, and drafted "Waterfront and Coastal Smart Growth Elements."
- Published numerous articles on the water quality benefits of smart growth approaches.

EPA AWARDS: Since 2001, I have received one gold medal, one silver medal, and three bronze medals for outstanding public service.

ICF CONSULTING, Fairfax, Virginia

1998 - 2000

Senior Associate

Generated new business in the sustainable development sector; analyzed economic, social, and environmental impacts from brownfields redevelopment; and completed legislative and policy analysis on a wide-range of environmental issues, such as brownfields, radon in drinking water, underground injection control wells, and environmental justice.

PRESIDENT'S COUNCIL ON SUSTAINABLE DEVELOPMENT, WASHINGTON, DC

1997 - 1999

Member Liaison and Member of the Environmental Management Task Force

I ensured equity issues had full representation in the Task Force's recommendations.

THE METROPOLITAN WASHINGTON COUNCIL OF GOVERNMENTS, WASHINGTON, DC

1997 - 1998

Planner II

Worked with WashCOG staff and partners to develop a comprehensive energy efficient policies and programs for local jurisdictions.

PEACE CORPS KAZAKHSTAN, Almaty, Kazakhstan
Associate Peace Corps Director—Environment

1994 - 1995

Developed and implemented first environmental program for Peace Corps, including 1) managing three staff and 12 Volunteers, 2) designed and implemented in-service training programs, NGO institutional development, and grants management, and 3) coordinated with local and national government officials, international funding organizations, Central Asian academic institutions, and local and international NGOs.

ISAR (FORMERLY THE INSTITUTE FOR SOVIET AND AMERICAN RELATIONS)
Central Asian Program Director, Almaty, Kazakhstan

1993-1994

Responsible for all aspects of starting an environmental small grants program funded by U.S. Agency for International Development; including managing four staff, program budget, federal contracts, and coordinating with U.S. AID, U.S. Embassy, and U.S. governmental officials and local non-governmental organizations.

Environmental Program Director, Washington, D.C.

1991 - 1993

Responsible for managing all environmental projects in the former Soviet republics, including developing funding proposals, serving as a technical communications consultant, and giving public and governmental briefings on the environmental situation in the former Soviet Republics.

ORGANIZATION FOR AMERICAN SOVIET EXCHANGES, Washington, D.C.

1989-1991

Developed a directory of Soviet environmental non-governmental organizations.

EDUCATION

Harvard University, Graduate School of Design, Loeb Fellowship in Advanced Environmental Studies, 2012- 2013

Indiana University, School of Public and Environmental Affairs, Bloomington, Indiana

- Masters of Science in Environmental Science, 1997
- Masters of Public Affairs, 1997
- Awarded "Most Outstanding Student" by faculty (1997) and won a first prize in a Fulbright Essay Contest (1996)

Allegheny College, Meadville, Pennsylvania, B.A. History and Political Science, 1988

SELECTED PROFESSIONAL PUBLICATIONS

Richards, Lynn. 2012. *Rural Water Infrastructure Practices*. Planning Magazine, August/September 2012.

Richards, Lynn. 2011. *Aligning Stormwater Goals and Community Goals*. Stormwater: The Journal for Surface Water Quality Professionals. Vol. 12, No. 6.

Richards, Lynn and A. Hall. 2009. *Water Quality Scorecard: Incorporating Green Infrastructure Practices at the Municipal, Neighborhood, and Site Scales*. EPA 231-B09-001.

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- "Greening the Globe: The Magic of Electronic Mail." *Surviving Together*, vol 11 issue 4, Winter 1993
- "The Greens of Kyrgyzstan." *Surviving Together*, vol 11 issue 3, Fall 1993.
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MALLORY B.E. BACHES

URBAN DESIGNER AND CIVIC SPECIALIST

1 OF 3

CURRICULUM VITAE

Mallory B.E. Baches A.I.C.P. LEED-AP CNU-A focuses her professional practice on the intersection of planning and community development, exploring the relationship between the quality of physical realm and the strength of civic engagement, involvement, and investment. She excels in helping individuals, groups, organizations, and communities develop expanded civic networks and increase resource cultivation within a strengthened built environment. Mallory is a gifted urban designer, a practiced public speaker, and an accomplished author.

EXPERIENCE

2018 - present Program Manager, CONGRESS FOR THE NEW URBANISM Washington, DC

- Leads strategy in Empowering Cities and Towns, supporting member- and organization-led initiatives to respond to the demand for walkable urbanism
- Directs the Project for Code Reform, an initiative in partnership with MEDC, MML, MPA, and AARP to empower incremental zoning code reform
- Manages the #NUFuture initiative facilitated by the organization, seeking to refocus the mission of the New Urbanist movement for the next 25 years
- Leads organization outreach to Local Governments, developing technical assistance and educational opportunities for municipal staff and elected officials

2013 - 2018 Founder and Director, THE CIVIC HUB Beaufort, SC

- Guided individuals, groups, and communities to use design principles in the development of civic capacity within their towns and neighborhoods
- Assessed and supported social capital expansion, increasing civic investment and encouraging social impact through strategic partnerships and initiatives
- Lead creation of bespoke community outreach services, focused on client mission and local conditions in utilizing a collective impact approach
- Served as the face and voice of firm practice through facilitation, lecturing, writing, and organizational representation and management

2011 - 2013 Executive Director, SEA ISLANDS 2050 Beaufort, SC

- Directed launch of the sustainability advocacy non-profit; implemented the mission, guided vision, and maintained organizational goals and objectives
- Built strategic partnerships, supported hands-on collaboration, provided public education and initiative advocacy, and led solution implementation strategy
- Maintained organizational management, oversaw public relations, and balanced fiscal duties with logistical coordination as the chief executive
- Developed an organizational business plan, including community analysis, operating plan, governance strategy, and outreach planning

2007 - 2012 Co-Founder, RIVERVIEW CHARTER SCHOOL Beaufort, SC

- Launched first public charter school in Beaufort County SC currently serving 600 K-8th students with an "Excellent" state school report card rating
- Helped in writing of school charter, including research of educational philosophy, curriculum themes, organizational approaches, and school culture
- Collaborated in research, development, and implementation of significant programs and policies reflecting the mission and vision of the school
- Spearheaded approval of school by local, state, and federal authorizing agencies and facilitated implementation of school operations for opening year

2004 - 2011 Co-Founder and Partner, DPZ • PACIFIC Kuala Lumpur, MALAYSIA

- Founded the first Duany Plater-Zyberk & Company affiliate, responding to demand for sustainable planning solutions in fastest-growing region of the world
- Developed innovation in urban design process and traditional architectural expression, translating best practices for unique international conditions
- Led firm management, procedural development, and financial oversight; provided public presentations, meeting facilitation, and consultancy support
- Served as communication and outreach leadership for the firm, providing oversight of publication copy, media strategy, and organizational branding

2000 - 2004 Project Manager, DUANY PLATER-ZYBERK & COMPANY Miami, FL

- Delivered schematic architectural design, master planning, site analysis, and coding serving wide ranging project types and client needs
- Managed project types ranging from greenfield to infill to downtown redevelopment to form-based code to sustainability-based to regional planning
- Communicated with firm principals, staff, project consultants, vested officials, local community, and client team in delivering a successful project outcome
- Chronicled principles and practices of firm work through both project publication documentation as well as regular journalistic coverage

1999 - 2000 Asst Town Architect, DUANY PLATER-ZYBERK & COMPANY Gaithersburg, MD

- Oversaw the implementation of Kentlands Architectural Code, reviewing builder submissions and coordinating with local planning approval department

MALLORY B.E. BACHES

2 OF 3

EDUCATION

1999	UNIVERSITY OF NOTRE DAME	Bachelor of Architecture
2018	UNIVERSITY OF OXFORD	MSc in Sustainable Urban Development

HONORS

2016	ATLAS COLLABORATIVE FOUNDATION	Trustee
2013	ASSOCIATION FOR COMMUNITY DESIGN	Board Member and former President
2013	NEXT CITY	Vanguard Class of 2013
2011	CONGRESS FOR NEW URBANISM	CNU-A
2006	AMERICAN PLANNING ASSOCIATION	AICP
2004	U.S. GREEN BUILDING COUNCIL	LEED-AP

EXPERTISE

- Urban design, theory, and planning, including the principles and practice of New Urbanism and current planning best practices
- Traditional architectural approach and application across the spectrums of building type and vernacular condition, both national and international
- Sustainability theory and integration into urban design and community development
- Digital medium use and curation, including its integration into design, communication, presentation, and outreach

SELECTED EXPERIENCE

THE CIVIC HUB

In founding The Civic Hub, Mallory's goal is to provide services to citizens and organizations seeking to improve their own communities but unsure of where to begin or without ample resources to do so. Building on her own experiences as a citizen activist, she has developed a series of engagement experiences that respond to a variety of group sizes and initiative scopes, emphasizing collaboration and supporting community building at every level of participation.

RURAL + CRITICAL

Serving as lead organizer of public education and outreach, Mallory worked with the Beaufort County Open Land Trust in campaigning for the 2012 ballot measure seeking re-funding of the Beaufort County Rural and Critical Land Preservation Program. Tasks included program branding and marketing, website development and social media presence, volunteer committee leadership and communication facilitation, community outreach planning and organization, public relations oversight, and news media coverage coordination. The ballot measure was successfully passed, approved by voters by a 2:1 margin.

SEA ISLANDS 2050

As founding Executive Director of Sea Islands 2050, Mallory's oversight included strategic partnerships, hands-on collaboration, public education, and initiative advocacy and implementation on behalf of the start-up sustainability advocacy nonprofit's membership. The role was an opportunity for Mallory to drive policy initiatives that sought broad-based community impact and left her with deep knowledge of local conditions, organizations, institutions, and civic leaders.

RIVERVIEW CHARTER SCHOOL

As a member of the school's Charter Committee, Mallory helped lay the groundwork for what Riverview Charter School is today. Her role gave her experience collaborating with educators, policy makers, fundraisers, legal experts, financial advisors, interested parents, and the community at large. She benefits from in-depth institutional knowledge as a school volunteer, committee member, former board member/ leadership, and parent of a current student.

AWARDS

- 2018 Congress for the New Urbanism *Charter Award* to VILLAGE OF PROVIDENCE, with DPZ CoDESIGN
- 2016 Congress for the New Urbanism *Charter Award* to CIVIC MASTER PLAN, with Metrocology, Inc.
- 2015 American Planning Association - North Carolina *Marvin Collins Planning Award* to BUILD A BETTER BOULEVARD project, with Metrocology, Inc.
- 2014 American Planning Association - South Carolina *Outstanding Planning Award* to CIVIC MASTER PLAN for Beaufort SC, with Metrocology, Inc.
- 2014 National Association of Homebuilders *Community of the Year* to THE VILLAGE OF PROVIDENCE, with DPZ CoDESIGN
- 2006 Homes for NC *Affordable Housing Achievement Project of the Year* to WILLOW OAKS HOPE VI project, with DPZ CoDESIGN

MALLORY B.E. BACHES

3 OF 3

SELECTED URBAN DESIGN

LEAN URBANISM PROJECT, *various cities*, implementation of pilot projects
CHRONICLE MILL, *Belmont NC*, historic preservation adaptive reuse
THE NEXT BIG THING, *Chattanooga TN*, tactical urbanism workshop
BUILD A BETTER BOULEVARD, *Belmont NC*, corridor study
SPRAWL REPAIR, *Beaufort SC*, industrial park incremental redevelopment
VAN DON, *Quang Ninh VIETNAM*, economic development zone masterplan
NATURE CITY, *Abu Dhabi UAE*, competition submittal for new waterfront city
RIPLEY VALLEY, *Queensland AUSTRALIA*, regional plan
PARADISE POINT, *Queensland AUSTRALIA*, masterplan & design manual

SOL SQUARE, *Christchurch NEW ZEALAND*, infill development
LORETO BAY, *Baja California Sur MEXICO*, sustainability-based development
HEART OF PEORIA, *Peoria IL*, downtown redevelopment & form-based code
NEW TOWN ST. CHARLES, *St. Charles MO*, greenfield development
WILLOW OAKS, *Greensboro NC*, Hope VI redevelopment
COCONUT GROVE STREETScape, *Coconut Grove FL*, walkability masterplan
BURTON AREA SECTOR PLAN, *Beaufort SC*, conceptual condition survey
VICKERY, *Atlanta GA*, greenfield neighborhood center development
NAS JAB NEW ORLEANS, *Belle Chasse LA*, military base redevelopment

CHARRETTES

CODE•BREVARD, *Brevard NC*
MORRIS SQUARE, *Charleston SC*
CIVIC MASTER PLAN, *Beaufort SC*
SMARTER STARTER HOUSING, *Beaufort SC*
RIPLEY VALLEY, *Queensland AUSTRALIA*
OCEAN BEACH, *Hawke's Bay NEW ZEALAND*
WEITI, *Auckland NEW ZEALAND*
SWEETWATER NEW CITY MASTERPLAN, *New South Wales AUSTRALIA*
MODENA BEACH/EXCELSA VILLAGE, *Papamoa NEW ZEALAND*
CENTRAL CITY SOUTH, *Christchurch NEW ZEALAND*
NANNING, *Guangxi Province P.R. of CHINA*
MIRADOR, *Marimbula AUSTRALIA*
YAN SHAN NEW TOWNSHIP, *Guilin P.R. of CHINA*
SYDENHAM SQUARE, *Christchurch, NEW ZEALAND*
SOUTH OF LITCHFIELD (SOL), *Christchurch, NEW ZEALAND*
FEC CORRIDOR STUDY, *Miami FL*
LOST RABBIT, *Jackson MS*
LAS LOMAS, *Los Angeles CA*
FIVE MILE, *Queenstown NEW ZEALAND*
SANDY POINT, *Edenton NC*
CRAIG RANCH, *McKinney TX*

LAS COLINAS, *Irving TX*
OWL'S HEAD, *Freeport FL*
JINDEE, *Western Australia AUSTRALIA*
BULACAN TOWNSHIP VILLAGE CENTER, *Manila PHILIPPINES*
DOWNTOWN CORAL GABLES, *Coral Gables FL*
ZHONG YI GARDEN, *Beijing P.R. of CHINA*
OCEANFRONT ASBURY, *Asbury Park NJ*
COCONUT GROVE STREETScape, *Coconut Grove FL*
THE VILLAGE OF PROVIDENCE, *Huntsville AL*
PARRIS ISLAND MARINE BASE, *Beaufort SC*
LA ESTANCIA MIGRANT HOUSING, *Wimauma FL*
LA PRIMAVERA, *Leon MEXICO*
THE COMMONS, *Tysons Corner VA*
PLAYAS DI TIJUANA, *Baja California MEXICO*
CHEROKEE FARMS, *Beaufort SC*
ESCAP, *St. Lucia WEST INDIES*
BUILDER MAGAZINE NAHB MODEL LIVEWORKS, *Atlanta GA*
ANCHOR MILL, *Huntersville NC*
CELADON, *Beaufort SC*
SUNCANA DOLINA, *Mostar BOSNIA-HERZEGOVINA*
HOTEL HEALDSBURG, *Healdsburg CA*

PRESENTATIONS

- 2017 Congress for the New Urbanism CNU.25 202 Workshop, *Beyond the Charrette: Connecting to Communities & Empowering Everyday Citizens*
- 2016 Association for Community Design Swap Meet, *Considering a Hierarchy of Community Needs*
- 2016 Congress for the New Urbanism CNU.24 Open Innovation, *The Art of Entitlement and Loving Where You Live*
- 2016 Congress for the New Urbanism CNU.24 Open Innovation, *Design for Good / Design for Impact*
- 2015 National League of Cities Congress of Cities, *The Art Advantage: Creative Placemaking Strategies for Your City*
- 2012 Growing Power Urban and Small Farms Conference, *Growing an Underlay Food System*

PUBLICATIONS

- 2019 New Urban Research (forthcoming), *Conflicts and Commonalities Between Urban Preservation and Social Sustainability in the Historic City of Bath*



Marina Khoury | RA, LEED AP, CNU-A Partner | DPZ Partners

Marina Khoury is an expert in sustainable urban redevelopment, regional planning, transit-oriented developments, affordable housing and form-based codes. As a partner at DPZ Partners, she has been Director of its Washington D.C. office since 2007. A licensed architect and fluent in several languages, Khoury has worked on the design and implementation of projects in the US, Canada, Europe and the Middle East including ground-breaking new codes around the world that mandate resilient urbanism. She speaks globally widely on issues related to Smart Growth and affordable, sustainable, and walkable communities. Marina is one of 20 members on the Expert Committee of Global Forum on Human Settlements (UNEP-GFHS) International Green Model City (IGMC) Initiative, under the United Nations Environment Programme (UNEP). Marina is also active in Washington area civic groups, including the Congress for the New Urbanism (CNU), where she served as a Board member of the CNU-DC chapter from 2007-2012. She currently serves on the following Boards: Chair of the Executive Board of Smart Growth America's Form-Based Code Institute (FBCI), and Board Member the Center for Applied Transect Study (CATS). She is a member of the New Urban Guild and a LEED Accredited professional. Most recently, Marina spoke at the United Nations in New York, for the 10th anniversary of the Global Forum for Human Settlements.

Education

1992 Master of Architecture,
University of Wisconsin,
Milwaukee

1992 Master of Urban
Planning, University of
Wisconsin, Milwaukee

1989 Bachelor of Science in
Architecture (with honors),
University of Wisconsin,
Milwaukee

1985-88 Ecole Speciale
d'Architecture, Architecture
Program, Paris, France

Affiliations

Form-Based Code Institute,
Chairperson

UN: Global Forum Human
Settlement. IGMC Expert
Committee Member

Lambda Alpha International,
George Washington Chapter,
Member

Center for Applied Transect
Study, Board Member

New Urban Guild, Member

Selected Experience

- Pensacola CRA FBC, Pensacola, FL
- Central Riyadh Redevelopment, KSA
- Sycamore: Suburban Retrofit Plan, Charleston, SC
- Orange County Comprehensive Plan & Zoning Rewrite, FL
- Downtown Bethel TOD Plan and Code, Bethel, CT
- National Kuwait Code, Kuwait
- Perdido Key Master Plan & Code, Perdido Key, FL
- Port au Prince Redvelopment Plan and Code, Port au Prince, Haiti
- Garden District Plan, Edinburgh, Scotland
- Mark Center and Small Area Plan and Code, Alexandria, VA
- Al Ain CBD, Abu Dhabi, UAE - Structure Plan and Code
- Hertfordshire Regional Guide to Growth Plan, Hertfordshire, UK
- River District Redevelopment Plan, Vancouver, Canada
- Miami 21, Miami, FL - Form-Based Code Zoning Rewrite,
- Loreto Bay Resort Town, Baja, Mexico
- Oakville Regional Plan, Ontario, Canada
- New Town St. Charles Master Plan and FBC, St. Charles, MO
- Friday Harbor Resort (formerly Big Bay Point), Inisfill, Ontario, Canada
- Miami-Dade County Agriculture & Rural Area Study, FL
- Westhaven Master Plan, Franklin, TN



Matthew Lambert

Partner | DPZ Partners

Matthew Lambert is a planner, urban designer, and architectural designer, with over 15 years of experience that covers a broad range of project types. He has managed projects for developer, municipal, and institutional clients which include form-based codes, regulatory reform, urban infill and redevelopment, greenfield development, campus redevelopment, and architectural design. Among his project experience, Matthew has focused on regulations and form-based codes, leading code projects and providing code-related education.

Lambert heads DPZ's office in Portland, Oregon, leading projects within the region and across the country. Matthew is active in the Congress for the New Urbanism (CNU), a member of the CNU's Board of Directors and a board member of the Cascadia regional CNU chapter.

Education

2005 Bachelor of Architecture and Computer Science, Magna Cum Laude, University of Miami

Affiliations

Congress for the New Urbanism (CNU), Board of Directors

CNU Cascadia, Board of Directors

Transect Codes Council, Board Member

Selected Experience

- Orange County, FL - Zoning Code Rewrite
- Hot Springs Village, AR - Comprehensive Master Plan and Zoning Code
- Albuquerque, NM - Economic Development-based Infill and Zoning Analysis with Zoning Update Recommendations
- CNU Code Reform Initiative, MI - Zoning Code Reform
- Reinvent Phoenix, AZ - Form-based Code and Master Plans for Transit-oriented Development
- Downtown Mobile, AL - Downtown Master Plan and Form-based Code
- Doña Ana County, NM - Regional Scenario Planning and Comprehensive Plan
- AARP California Strategy Study, CA - Development Pattern Analysis
- Atlanta Regional Commission Aging Forum and Lifelong Communities
- Bawabat Makkah Lands, Makkah, Saudi Arabia - Scenario Planning and Form-based Code
- Hertfordshire Regional Growth Plan, England - Regional Scenario Plan
- Scottish Sustainable Communities Initiative, Scotland - Country-wide Redevelopment and Growth Framework
- Presence Sts. Mary and Elizabeth, Chicago, IL - Medical Campus Redevelopment
- Presence Resurrection Medical Center, Chicago, IL - Medical Campus Redevelopment
- East End Revitalization, Richmond, VA - Medical-initiated Infill Redevelopment