



# **New Haven Proposal for Planning Services**

**January 16, 2025**



**Carlisle | Wortman  
Associates**

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**Carlisle | Wortman**  
ASSOCIATES, INC.

117 NORTH FIRST STREET SUITE 70 ANN ARBOR, MI 48104 734.662.2200 734.662.1935 FAX

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January 16, 2025

Genevieve Rodzik, Planning Commission Chairperson

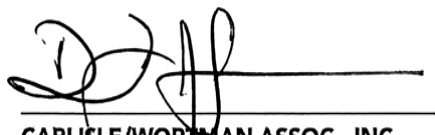
Re: Carlisle|Wortman Associates Introduction

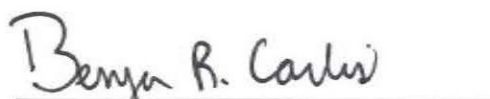
Dear Ms. Rodzik,

Our multi-disciplinary team of professional planners and landscape architects is among the most experienced in the State. Our core service is to act as an expert and extension of the community with the goal of building strong, attractive, and more livable communities. Established over forty years ago, the firm actively serves over 80 municipal clients with the majority of our work focused on continuing planning and zoning services. We have an extensive history and familiarity with Macomb and Oakland County communities and are currently working for a number of surrounding communities.

The planning services we provide to communities include development reviews, zoning administration and office hours, Master Planning, and Zoning Ordinance rewrite and administration. The proposed team includes Ben Carlisle as President, Dave Scurto as Project Manager, and Shana Kot for day-to-day services.

We are excited to meet with you to discuss the Village's land use and planning needs. If you have any questions, please contact us at (734) 662-2200.

  
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CARLISLE/WORTMAN ASSOC., INC.  
David Scurto, AICP  
Principal

  
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CARLISLE/WORTMAN ASSOC., INC  
Benjamin R. Carlisle, AICP, LEED AP  
President

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# Corporate Background

## A Philosophy of Service and Commitment to Michigan

Since 1981 Carlisle/Wortman Associates Inc. has been providing public sector clients with professional planning services. Our highly experienced professionals are forward thinking, both experienced and accomplished at finding sound and creative strategies to fit our clients' needs. Our core service is to act as an expert and extension of the Village with the goal of building strong, attractive, and more livable communities. Our continuing success is a direct result of the philosophy to which we adhere: responsiveness, commitment, trust, and success.

We have been exclusively servicing Michigan for over forty years. With a commitment to public service, we only provide services for governmental and non-profit entities ranging from townships, cities, and counties to community development organizations and public transit agencies. We take pride in the fact that Carlisle/Wortman Associates does not represent private developers, as we believe this creates a conflict of interest. The firm currently serves over 80 clients, the majority of which are centered on continuing planning services. Each client is personally represented by a principal of the firm.

CWA has a long standing relationship with communities in Southeast Michigan providing planning consultation services since 1981. We currently represent many of similar and neighboring communities.

## Corporate Information

- a. Carlisle/Wortman Associates: 20 professional employees with offices located in Ann Arbor, and Troy Michigan. CWA was founded in 1987.
- b. Office Location: Office work would be performed out of the Ann Arbor office;  
117 N. First Street, Suite 70  
Ann Arbor, Michigan 48104  
(734) 662-2200 phone  
(734) 662-1935 fax

## Points of Contact

Dave Scurto, AICP  
Principal-in-Charge  
DScurto@cwaplan.com

Ben Carlisle, AICP  
President  
BCarlisle@cwaplan.com

- c. CWA Services include:
  - Continuing planning services
  - Zoning studies and ordinance preparation
  - Development Review
  - Master planning
  - Code enforcement
  - Building Department Services
  - Corridor studies
  - Greenway and open space planning
  - Environmental/watershed planning
  - Park and recreation plans
  - Litigation assistance
  - Economic development plans and studies
  - Grant assistance



# Corporate Background

## Our Clients can rely on CWA for:

### **Responsiveness**

We believe in constant contact with our clients via telephone, in person meetings, email, and mobile communication and at hours beyond standards business practice.

### **Commitment**

We have been working with client communities for over 40 years.

### **Trust**

We cherish long-term client-consultant relationships built by listening intently to client needs, maintaining clear and frequent contact, providing timely and responsive service, and exceeding expectations.

### **Success**

We equip our clients for success by sharing our expertise, leadership, and creativity while educating communities to ensure successful solutions.

# Work Approach

Carlisle/Wortman Associates, Inc. business philosophy is to establish ongoing and long-term relationships with our public sector clients. However, just like our clients, we are constantly growing and evolving to address modern day challenges. Always aware of the issues that face our individual communities we can customize our wide range of services to meet their personal goals. As a result, we pride ourselves on serving numerous communities for periods extending over 40 years.

The core of our business has been providing the types of services needed by communities on a day-to-day basis. As such, we understand from our experience that the Village seeks a firm that is capable of serving many roles.

More specifically, our staff is well-versed in each of the requested services, which include:

Planning/General Consultation: We will provide day-to-day consultation to municipal staff regarding issues relating to Zoning Ordinance regulations, future land use, site issues, state regulations and other legislative responsibilities.

Development Review: We will review all development proposals upon request such as site plans, rezoning, special land use requests, PUDs and other matters related to zoning compliance. We provide comprehensive reviews to assist the Planning Commission and Village Council in making a decision on planning issues.

Meeting Attendance: We will attend all Planning Commission meetings. In addition, we can attend Zoning Board of Appeals and Village Council meetings, as requested. At the meetings we advise, assist, and coordinate with the respective board.

Variance Reviews: When requested, we provide reviews of variance requests and attend Zoning Board of Appeals meetings.

Lot Split Review: We provide assistance upon request to the Village staff by reviewing lot split/combination applications to determine whether the split meets the Land Division Act or Ordinance requirements.



# Work Approach

Ordinance Amendments: From time to time, the Village Ordinance needs to be revised. In most cases, our office prepares the draft language, working closely with the Village Attorney, staff, and Planning Commission.

Education and Training: We view this as a continuous process. We make our clients aware of changes in legislation and new planning techniques. Included in our retainer is annual training session either to the Planning Commission, Zoning Board of Appeals, Village Council of any combination thereof. The topic can be customized based on client interest. We view education and training as part of our ongoing responsibility.

Master Plan: We have prepared and updated over hundreds of Master Plans over the past forty years, ranging in size of communities from with a population of 350 to over 90,000. In proximity to New Haven, we have prepared Master Plans for Macomb, Oxford, Orion, Brandon, and Independence Townships and City of St. Clair.

## Additional Planning and Other Services:

Additional services that are available within the Carlisle/Wortman Team include the following:

Community Input and Visioning: Coordination and facilitation of public input workshops, including visioning, goal setting and prioritization, data collection, and community buy-in.

Recreation Planning: Preparation of community recreation master plans, park master plans, greenway plans, and recreational facility design. All plans are written to meet MDNR grant requirements.

Historic Preservation: Preparation of historic district ordinances, historic district surveys and preservation strategies.

Environmental/Watershed Planning: Preparation of site surveys and analysis of natural resources. Drafting of preservation plans. Development of water quality planning tools, including watershed group facilitation, watershed management plan development, and water resource planning.





# Work Approach

Economic Development/TIF: Establishment, staffing, and administration of Downtown Development Authorities, Corridor Improvement Authorities, and Local Development Finance Authority. Economic development planning including business retention, business attraction, employment growth, market studies, asset inventories, and real estate inventories and strategy development.

Expert Testimony: Research and testimony in land use and zoning disputes and condemnation.

Geographic Information: Land use analysis, mapping, presentation development, and computer-aided design services using GIS and CAD technology.

Grant Writing: Research for and preparation of grant applications for a wide array of activities, including transportation, recreation, brownfield redevelopment, environmental preservation, and downtown development projects.

Capital Improvements: Development of various capital planning tools, such as capital improvement plans and building feasibility studies. Facilitation of group meetings involving different municipal departments, elected officials and public leaders.

Code Consultation: Field inspection and follow-up to resolve zoning code infractions. Review of construction documents for compliance with the construction codes related to building, plumbing, electrical, mechanical, and fire suppression. Resolution of non-compliance issues to create plans acceptable for permit issuance.



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# Professional Staff

## Professional Staff: A Full-Service Client Team Methodology

We believe in a full-service client team approach. Each Client Team is represented by a Principal-in-Charge, and a project manager, and the team is assembled on the basis of client needs. We have designated a Client Team that includes experience, creativity, and solid professional credentials as well as familiarity with Macomb County and the surrounding area.

The team is represented by Dave Scurto as Principal-in-Charge, Ben Carlisle as President, and Shana Kot as Planner. Dave Scurto has extensive experience in Macomb County.



**Dave Scurto**

as Principal-in-Charge



**Ben Carlisle**

as President



**Shana Kot**

as Planner and Office Hours



**Chris Nortstrom**

as Landscape Architect

# Professional Staff

**Dave Scurto, AICP, Principal** is a community planner with 37 years of experience in municipal planning and development. He focuses on urban places, central place cities, inner ring suburbs, and economic redevelopment. He has worked with the nationally acclaimed Redevelopment Ready Communities program, sat on boards for state and national planning associations, and is chair of the Macomb County Brownfield Redevelopment Authority. Mr. Scurto works with several municipalities on planning, zoning, operations and economic development projects. He has experience with tax incentive and credit programs, business retention and recruitment, tax increment financing, partnering, public property acquisition, code enforcement and development approval processes. The Michigan Municipal League retains Mr. Scurto for basic and advanced training on planning, land development and zoning topics. Mr. Scurto has presented on redevelopment at Michigan Association of Planning and National Brownfield Association conferences. He also was part of a recent MAP award winning team for implementation of a Master Plan.

## EDUCATION

MArch, Masters of Architecture | University of Detroit Mercy (emphasis on community development)

BArch, Architecture | University of Detroit

## EXPERIENCE

Principal, Carlisle|Wortman Associates, Inc.  
Ann Arbor, MI, 2011 - Present

Associate, Carlisle|Wortman Associates, Inc.  
Ann Arbor, MI, 2007 - 2011

Project Manager/Senior Planner,  
Hamilton Anderson Associates, Inc,  
Detroit, MI, 1995-1998; 1999-2007

Senior Planner,  
The Strader Group  
Royal Oak, MI, 1998-1999

Vice President/Planner,  
Gerald Luedtke and Associates, Inc.  
Detroit, MI, 1985-1995



## Credentials & Professional Affiliations

American Institute of Certified Planners Registration No. 008484

American Planning Association |  
Member No. 077753

Michigan Association of Planning,  
Past President and Board Member  
2004-2011

American Planning Association  
Chapter President's Council. MAP  
representative to the American  
Planning Association, 2006 - 2010

Macomb County Brownfield  
Redevelopment Authority,  
Chairperson

# Professional Staff

**Benjamin R. Carlisle, AICP, President**, has twenty years of experience working as a professional planner, including experience in zoning, land use and comprehensive planning, site planning, Tax Increment Financing, and economic development. With Carlisle|Wortman Associates, Mr. Carlisle serves as principal-in-charge to the Cities of Troy, Berkley, Ann Arbor and Ypsilanti and the Townships of Pittsfield, Superior, and Ypsilanti. Mr. Carlisle previously served as the Interim Planning Manager for the City of Ann Arbor.

Mr. Carlisle also serves as a planning and zoning trainer for the Michigan Municipal League, and is the former Region IV representative to the American Institute of Certified Planners Board of Commissioners.

## EDUCATION

BA, Urban Planning and Geography | Miami University

MUPP, Urban and Regional Planning | University of Illinois - Chicago

## EXPERIENCE

President, Carlisle|Wortman Associates, Inc.  
Ann Arbor, MI, 2023 - Present

Principal, Carlisle|Wortman Associates, Inc.  
Ann Arbor, MI, 2011 - 2022

Senior Planner, Teska Associates, Inc.  
Evanston, IL, 2007 - 2011

Planner II, City of Highland Park  
Highland Park, IL, 2003 - 2007



## Credentials & Professional Affiliations

American Institute of Certified Planners | Reg. # 136134

LEED Accredited Professional Leadership in Energy & Environmental Design

Form Based Code Institute Certified

American Planning Association

Michigan Association of Planning

U.S. Council on Green Building

## Honors

Michigan Association of Planning  
Daniel Burnham Award-Ypsilanti Township 2040 Master Plan

Chaddick Institute Development Control Awards Winner,  
Highland Park Pedestrian Shopping Overlay District.

# Professional Staff

**Shana Kot** is a community planner with experience in policy writing, site plan review, and community engagement. She graduated from Wayne State University with a Master of Public Administration and Graduate Certificate in Economic Development. Shana's graduate work enables her to shape healthy communities through a deep understanding of both urban planning and policy implementation. Prior to earning her graduate degree, Shana received a Bachelor of Arts in Sociology from Oakland University and worked for nearly eight years in the customer service industry. Shana is also a member of the Michigan Association of Planning (MAP) and International City/County Management Association (ICMA).

## EDUCATION

Master of Public Administration, Wayne State University

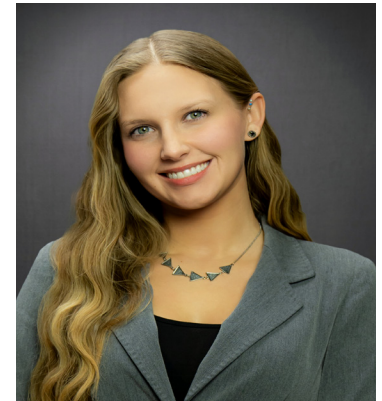
Graduate Certificate in Economic Development, Wayne State University

Bachelor of Arts in Sociology, Oakland University

## EXPERIENCE

Community Planner, Carlisle | Wortman Associates, Inc.  
Ann Arbor, MI, January 2023- Present

Intern, City of St. Clair Shores  
St. Clair Shores, MI, September 2021-August 2023



# Professional Staff

**Chris Nordstrom, PLA, ASLA** is a landscape architect with experience in both public and private sector projects. Chris has a strong interest in sustainable design and development. His experience includes recreation plans, park plans/designs, trail plans/ designs, municipal infrastructure, large scale property development and marketing, housing designs, and parking studies for both public and private sector clients. Chris' abilities span the areas of graphic communications, public engagement, report writing, and Geographic Information Systems.

## EDUCATION

MLA, Landscape Architecture | University of Michigan

BGS, Bachelor of General Studies | University of Michigan

## EXPERIENCE

Landscape Architect, Carlisle/Wortman Associates, Inc.

Ann Arbor, MI, 2015-Present

Landscape Designer, Johnson Hill Land Ethics Studio

Ann Arbor, MI, 2014 - 2015

Landscape Designer, Tegn\_3

Trondheim, Norway, 2010 – 2013



## Credentials & Professional Affiliations

American Society of Landscape Architects

Practicing Landscape Architect, License No. 3901001632

Michigan Chapter, ASLA

Landscape Architecture Faculty Award

Michigan Garden Clubs Fellowship

Frank Caleb & Margaret Thompson Gates Student Endowment

Honor Society of Sigma Lambda Alpha



# Experiences and References

## Relevant Experience with Client Communities:

The following people are some of the clients with whom we have worked with in southeast Michigan. We encourage you to call them to discuss our professional performance and skills.

### **Josh Bocks, Planning Director**

Macomb Township

(586) 992-0710

### **Brent Savidant, Community Development Director**

City of Troy

(248) 524-3366

### **Jeff Dobek, City Manager**

City of Riverview

(734) 281-4201



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# Scope of Services and Budget

## Option 1: Retainer with Office Hours

CWA will assign one qualified and experienced planner to provide the following services:

- One full day per week of in office support.
- Manage zoning administration.
- Staff the Planning Commission, and Zoning Board of Appeals.
- Assist residents and potential applicants with zoning and planning questions.
- Draft public hearing and legal notices for rezoning, ordinance amendments, and special land uses.
- Assist applicants in completing and filing applications for ZBA, rezoning, site plans, etc. by appointment, as needed.
- Review Planning Commission and Zoning Board of Appeal agendas, public hearing and legal notices for rezoning, ordinance amendments, and special land uses.
- Review all commercial, industrial, and multi-family zoning compliance applications including final site inspections.
- Review of all land division applications.
- Attendance at all pre-application meetings.
- Other duties as assigned.
- Unlimited phone call and email consultation between our team and Village staff, developers, and residents on all planning, zoning, and land use issues on days not in office.

Many of assigned tasks can be accomplished by the assigned planner in the one day in office. For days not in the Village offices, the assigned planner would be available via phone and emails.

### Budget:

\$4,800 per month (inclusive of travel time, mileage, cell phone, attendance at Planning Commission and Zoning Board of Appeals meetings, unlimited phone calls and emails). Time spent performing work during scheduled office hours that is billable as a pass-through cost to an applicant shall result in a reduction in the daily retainer fee charged to the Village. Attendance at additional meetings, including pre-application meetings will be billed at the hourly rate listed below. Retainer will increase 5% every year.



# Scope of Services

## **Option 2: Retainer without Office Hours**

CWA will assign one qualified and experienced planner to provide the following services:

- Consultation with Village Staff regarding zoning administration.
- Staff the Planning Commission, and Zoning Board of Appeals
- Assist residents and potential applicants with zoning and planning questions.
- Review Planning Commission and Zoning Board of Appeal agendas, public hearing and legal notices for rezoning, ordinance amendments, and special land uses.
- Unlimited phone call and email consultation between our team and Village staff, developers, and residents on all planning, zoning, and land use issues.
- Attendance at Planning Commission and Zoning Board of Appeals meetings.

### **Budget:**

\$1,200 per month. Any other work or attendance at additional meetings, including pre-applications meetings will be billed at the hourly rate listed below. Retainer will increase 5% every year.



# Scope of Services

## Development Review

We will provide development review for all site plans, special land use requests, rezoning, etc. Reviews will be transmitted to the Village in a timely fashion (one (1) week prior to the scheduled meeting) to allow the Planning Commission and Zoning Board of Appeals ample time to review the information. As part of our retainer, we will attend Planning Commission and Zoning Board of Appeals meetings to explain our review comments and to provide general assistance and consultation to the Planning Commission.

Development review (site plans, subdivision plats, rezoning, etc.) is performed in accordance with a pre-agreed fee schedule. This schedule is established so that applicants, not the general fund, can be charged the appropriate review fees by means of a set fee schedule as developed by the Village. Development review fees will be charged at the hourly rate listed below.

## Hourly Charge

Occasionally tasks assigned fall outside of the above tasks, including development review. In those cases, our current hourly rate schedule is as follows:

TITLE	2025	2026	2027
President (B. Carlisle)	\$150	\$158	\$166
Principal (D. Scurto)	\$145	\$152	\$160
Associate	\$130	\$136	\$143
Plannner (S. Kot)	\$125	\$131	\$138
GIS Technician	\$110	\$115	\$121
Support Staff	\$95	\$100	\$105

## Studies and Amendments

From time to time, the Village may request more in-depth studies, amendments, etc. In this case, we will bill our time based on current hourly rates or provide Village Staff with a written not-to-exceed cost proposal, if requested.

## Billing

Detailed invoices are mailed monthly.



# Appendix

## Planning

**Retainer Services:** Consulting support to local staff, officials, and planning commissions on a continuing basis. Such consultation includes attendance at meetings, interpretation of ordinances, training and education, and direction of staff on policies and procedures.

**Development Review:** Review of site plans, subdivisions, site condominiums, rezoning petitions, variance requests, and special use permits for conformance with ordinances and policies.

**Master Planning:** Preparation of community master plans, including demographic, land use, transportation, and environmental studies, as well as public visioning and input.

**Recreation Planning:** Preparation of community recreation master plans, park master plans, greenway plans, and recreational facility design.

**Historic Preservation:** Preparation of historic district ordinances, historic district surveys and preservation strategies

**Community Input/Visioning:** Coordination and facilitation of public input workshops, including visioning, goal setting and prioritization, data collection, and community buy-in.

**Geographic Information:** Land use analysis, mapping, presentation development, and computer-aided design services using GIS and CAD technology.

## Zoning

**Zoning + Land Use:** Preparation of comprehensive zoning regulation ordinances, single purpose land use ordinances, and environmental ordinances to fit within the context of a community's current regulations. Modification and updates to existing ordinances to meet current legal requirements. Development of model ordinance language.

## Economic Development

**Economic Development:** Development of feasibility and market analysis. Preparation of industrial, commercial and waterfront development and redevelopment programs that consider labor characteristics, projected growth, and site and environmental characteristics, among others.

## Green Development

**Environmental Consulting:** Site visits, preparation of site surveys, and analysis of natural resources. Consulting support to local staff, officials and planning commissions regarding environmental issues such as wetland, woodland, steep slope impacts, and construction site issues, such as soil erosion and stormwater.



# Appendix

**Environmental/Open Space Planning:** Preparation of environmental preservation and open space plans, including identification and evaluation of ecosystems, community input and visioning, goal setting, and development of action plans. Preservation plans strive to integrate people into the natural environment while preserving/restoring connections between landscape features.

**Watershed Planning:** Development of water quality planning tools, including watershed group facilitation, watershed management plan preparation, and water resource planning.

**Low Impact Development:** Assist with the integration of Low Impact Development (LID) approaches and techniques into local planning documents, ordinances, and engineering/design standards.

**Environmental Ordinances:** Preparation of ecologically-based ordinances that allow for development while preserving the site's natural features and ecological functioning. Ordinances range from preserving open space links and ecosystems through clustering and open space developments, to feature-specific regulations such as wetlands protection, riparian buffers, and woodlands/tree preservation. Another area of expertise includes regulations pertaining to zoning design standards, such as setbacks, private roads, and parking areas.

## Other Community Services

**Capital Improvements:** Development of various capital planning tools, such as capital improvement plans and building feasibility studies. Facilitation of group meetings involving different municipal departments, elected officials and public leaders.

**Emergency Management:** Research and preparation of hazard analysis and pre-and post-disaster mitigation plans. Risk assessment, mapping, and ordinance development.

**Planning Administration:** Provide administrative services including management of day-to-day planning, building and code enforcement activities.

**Grant Writing:** Research for and preparation of grant applications for a wide array of activities, including transportation, recreation, brownfield redevelopment, environmental preservation, and downtown development projects.

**Expert Testimony:** Research and testimony in land use and zoning disputes and condemnation.

## Municipal Service Partners

**Building Services:** Construction plan review, consultation of construction code issues, and construction inspection services. CWA also offers a full-service Building Department program.

# Appendix

## Summary of Similar Clients

		General Planning	Development Review	Master Planning	Ordinance Revisions	Special Studies	Expert Testimony	Recreation Planning
Oakland County	Oakland Township	✓	✓	✓	✓	✓		✓
	City of Troy	✓	✓	✓	✓	✓		
	Orion Township	✓	✓	✓	✓	✓	✓	
	City of Pontiac	✓	✓	✓	✓	✓		✓
	Independence Township	✓	✓	✓	✓	✓		✓
	Oxford Charter Township	✓	✓	✓	✓	✓	✓	✓
St. Clair County	Wales Township	✓	✓					
	City of St. Clair	✓	✓	✓	✓	✓		
	City of Algonac	✓	✓	✓	✓	✓		
	Columbus Township	✓	✓	✓	✓			
Wayne County	Huron Township	✓	✓	✓	✓	✓	✓	✓
	City of Romulus	✓	✓		✓	✓	✓	
	Sumpter Township	✓	✓	✓	✓	✓	✓	✓
	Gross Pointe Shores	✓	✓			✓		
	Canton Township	✓	✓			✓		
Washtenaw County	Ypsilanti Township	✓	✓	✓	✓	✓	✓	
	Superior Township	✓	✓	✓	✓	✓		✓
	Salem Township	✓	✓	✓	✓	✓	✓	✓
	City of Ann Arbor	✓			✓	✓		
	Scio Township	✓	✓	✓	✓	✓	✓	✓
	Pittsfield Township	✓	✓	✓	✓	✓	✓	✓
Macomb County	Macomb Township	✓	✓		✓	✓		
	City of St. Clair Shores	✓	✓			✓		
	City of Center Line	✓	✓			✓		

# Appendix

## Active Client Map

