



Carlisle Master Plan School Committee Report

March 20th, 2019
Master Plan Steering Committee

Broad Integration of Master Plan Initiatives

“Current boards and committees have identified goals and actions for the coming year **based on the final Plan** – e.g., the Select Board has appointed two committees that will focus on the 2 **Cultural Districts** and the Planning Board is considering major revisions to special permit **housing** development options found in the Zoning Bylaw. Additionally, the Town Manager is asking town staff to incorporate recommended actions in Department goals.”

Marcia Rasmussen,
Planning Director, Concord

<https://concordma.gov/DocumentCenter/View/15250/Final-Envision-Concord-Plan-7-30-18-Full-Version-79MB>



Basis for Zoning Amendments & Other Influences

“We have made a lot of **zoning** changes, including upgrading the Industrial and Business zoning, and are working on potential changes to some aspects of **housing** zoning. The analysis of housing trends and needs has probably influenced the Board’s attitudes to what type of development it encourages to sites where there are choices. We contribute our thoughts to things like **Ped & Bike** plan, Strategic housing study, **Senior Needs** survey, **referencing the Plan.**”

Catherine Perry
Assistant Planner, Bedford

https://www.bedfordma.gov/sites/bedfordma/files/file/file/comprehensive_plan_12_10_2013_1.pc



THE BEDFORD WE WANT:
SHAPING OUR FUTURE
COMPREHENSIVE PLAN

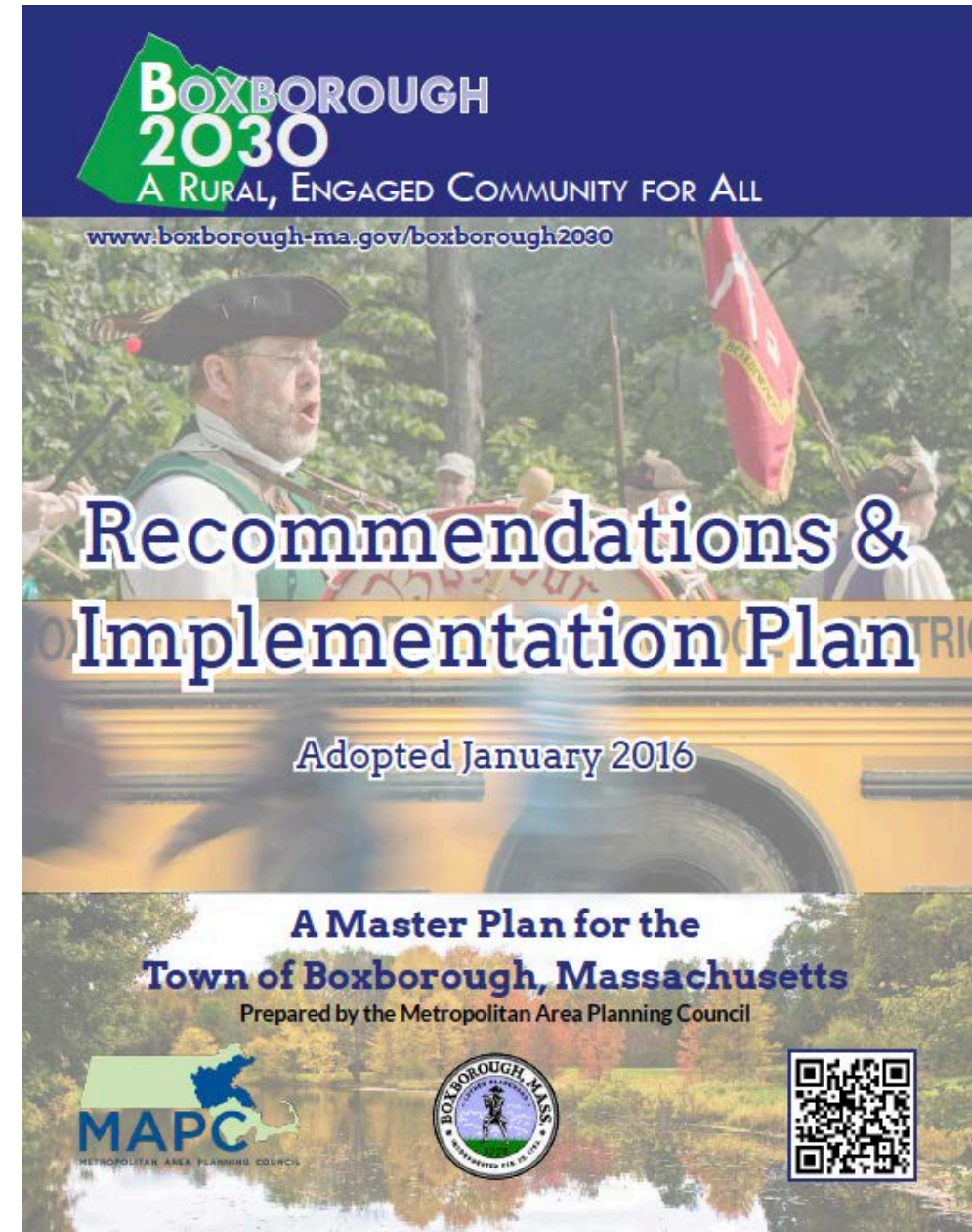
Bedford Planning Board
December 2013

Commitment from Community Leaders

“Our Select Board, Planning Board, **Economic Development** Committee, **Water** Resource Committee, **Agricultural** Commission, and other Town Boards, Committees, and Commissions have really embraced the Master Plan and do their best to adhere to it. The Master Plan Implementation Committee holds the other Town boards, committees, and commissions **accountable for the action items [that] they are assigned, in the Master Plan.**”

Adam Duchesneau,
AICP, Town Planner, Boxborough

<http://www.boxborough-ma.gov/boxborough2030>

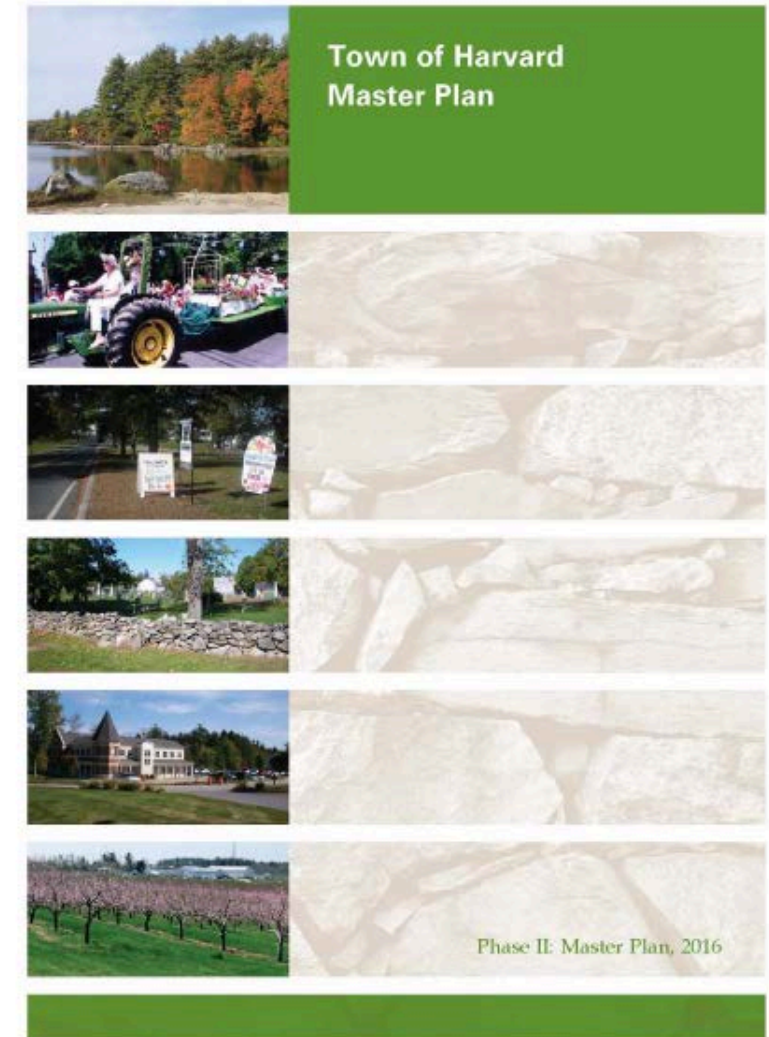


Implementation of Priority Initiatives

“We broke down the Action Plan into specific tasks for various boards and departments to complete. After the first year, we tracked the items that had been completed or were being actively worked on, and put it [the list] up on the web. The intent is to update this [list] annually and send reminders to the departments to urge implementation. In addition, every year the Planning Board conducts a retreat where it identifies its objectives for the next fiscal year. **Implementing the MP plays a prominent role, with the Board deciding which tasks to take on for the coming year. I would say it completes 2 or 3 of its assigned Action Plan tasks each year,** most of which are adopted. Some difficult tasks may flow into the next year. The Selectmen are also very active in implementing their tasks. They also prepare an annual list of goals and consider their remaining MP tasks.”

Christopher Ryan,
Town Planner, Harvard

<https://www.harvard.ma.us/master-plan/pages/2016-master-plan>



Vision Statement for Master Plan Process

“Carlisle seeks to develop a comprehensive long-range master plan that addresses both short-term needs and long-term goals for the town. The master plan, developed through a community process, will inform town policy, guide decision makers and inspire members of the community to participate in Carlisle’s ongoing improvement as a sustainable community.”

From MPSC Report to Planning Board, November 2017



Purpose of the Master Plan

- a **shared vision** that is developed through an inclusive community process
- a **road map** (with targets & metrics) for the town to prioritize future community needs and measure progress towards meeting these goals
- an **integrated approach** that takes input and builds consensus among interested stakeholders
- a **comprehensive** action plan that addresses both short-term needs and long-term goals

Importance of the Master Plan

- Creates shared goals and priorities to align community needs and to help coordinate efforts of **boards and committees**
- Supports **Board of Selectmen, FinCom & School Committee** efforts to plan for expenditures over multiple years and prioritize investments
- Creates a **citizens** forum to discuss and explore new ideas with town-wide participation

Master Plan Committee Structure

Master Plan Steering Committee (MPSC) (7 members)

- Develop master plan process, work plan, schedule and fee estimate
- Make recommendations on budget requirements
- Manage RFP process for hiring and procuring a planning consultant
- Coordinate and manage master plan process and planning consultant
- Coordinate Master Plan Advisory Committee Formation
- Report to Planning Board, Board of Selectmen, and FinCom

Master Plan Advisory Committee (MPAC) (40 members)

- Participate in regular master plan meetings (every 2-3 months)
- Provide input to MPSC and consultants on community interests and concerns
- Act as a resource to community members on master plan content and process

Guiding Principles for the Master Plan

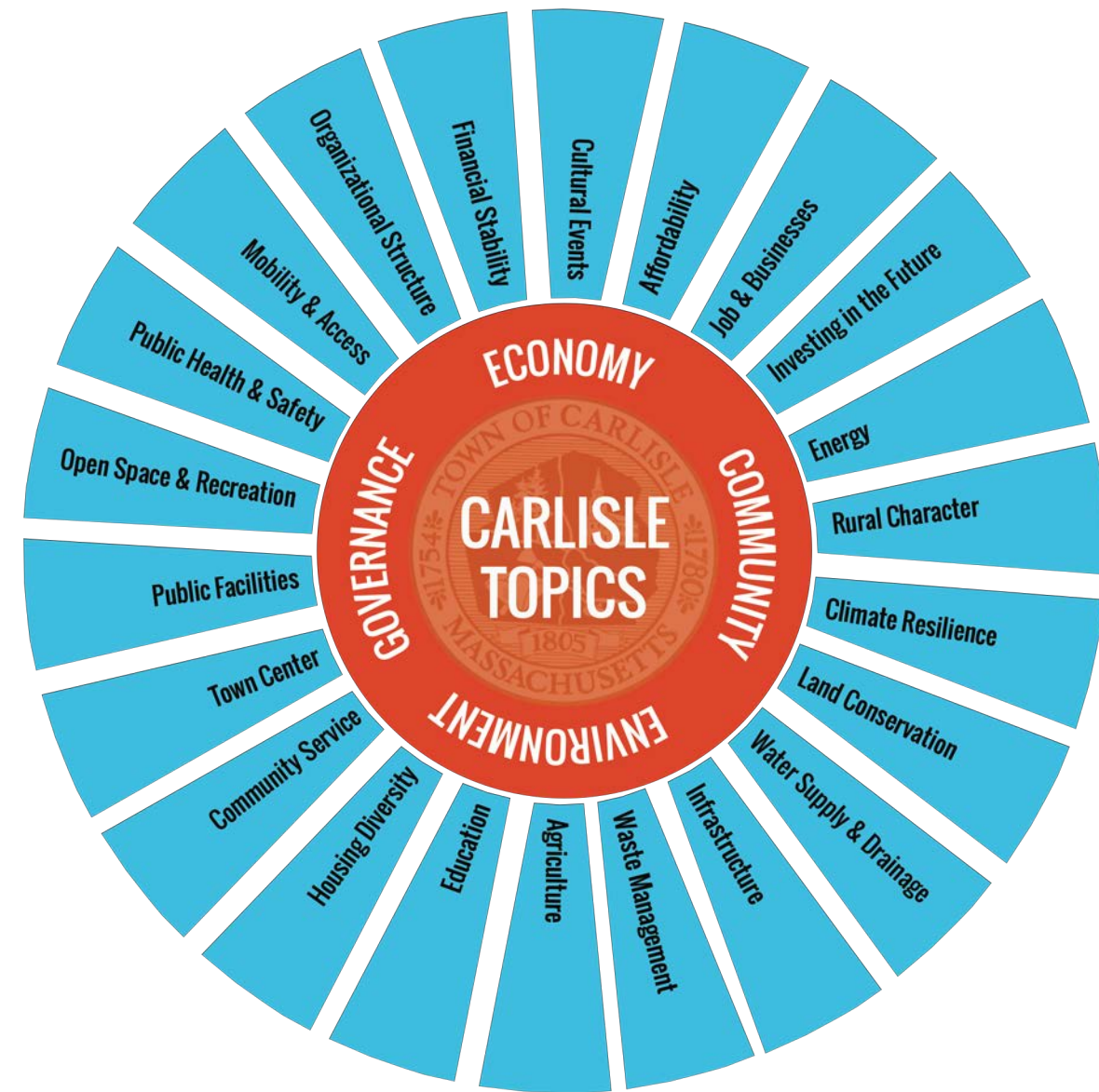
Action Oriented Approach: The master plan will identify clear policy direction and priority projects, outline roles and responsibilities, and define approaches to funding and implementation with the expressed goal of timely implementation. The plan will establish a phasing strategy that embraces master plan goals yet is feasible and can be implemented within a reasonable time frame.

Community Engagement: The master plan will undertake a robust community engagement process that reaches and engages with all of Carlisle's constituents. The goal of the master planning process is to raise awareness among town residents, identify key players and leadership, and build support across interest groups. The engagement process will include: interviews with key stakeholders and town boards and committees, focus group meetings, social media and a web site, public workshops and surveys.

Measure Success: The master plan process will embrace a performance-based approach that establishes targets and a dashboard for measuring outcomes. A data-driven planning method will help Carlisle's residents understand the tradeoffs and benefits of decisions as we work to balance our goals. The master plan will help Carlisle prioritize actions and measure our progress towards achieving the town's goals.

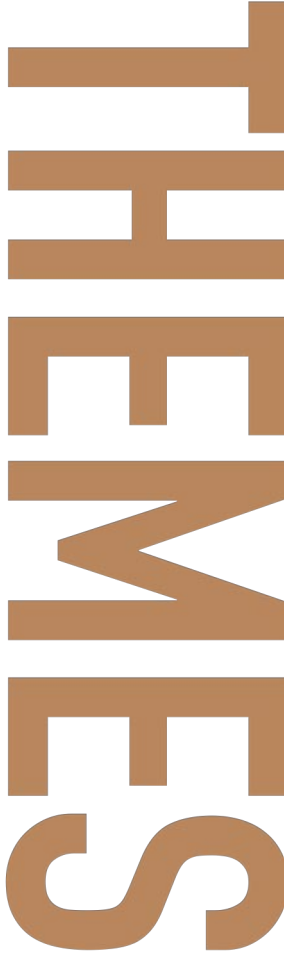
Guiding Principles for the Master Plan (cont'd)

Integrated Planning: The master plan must incorporate the elements required by the State as outlined in M.G.L. Ch. 41, s. 81-D. These elements include: Goals and Policies, Land Use, Housing, Economic Development, Natural and Cultural Resources, Open Space and Recreation, Services and Facilities, Circulation and Transportation, and Implementation. There are a number of additional topics that are not included in the 81-D law that will be incorporated in the Carlisle Master Plan consistent with current planning practices in the Commonwealth. To this end the MPSC has developed an “Integrated Planning Framework” that encompasses all of the topics relevant to creating a sustainable future for the Town of Carlisle. The attached diagram is an illustration of the Carlisle Integrated Planning Framework.



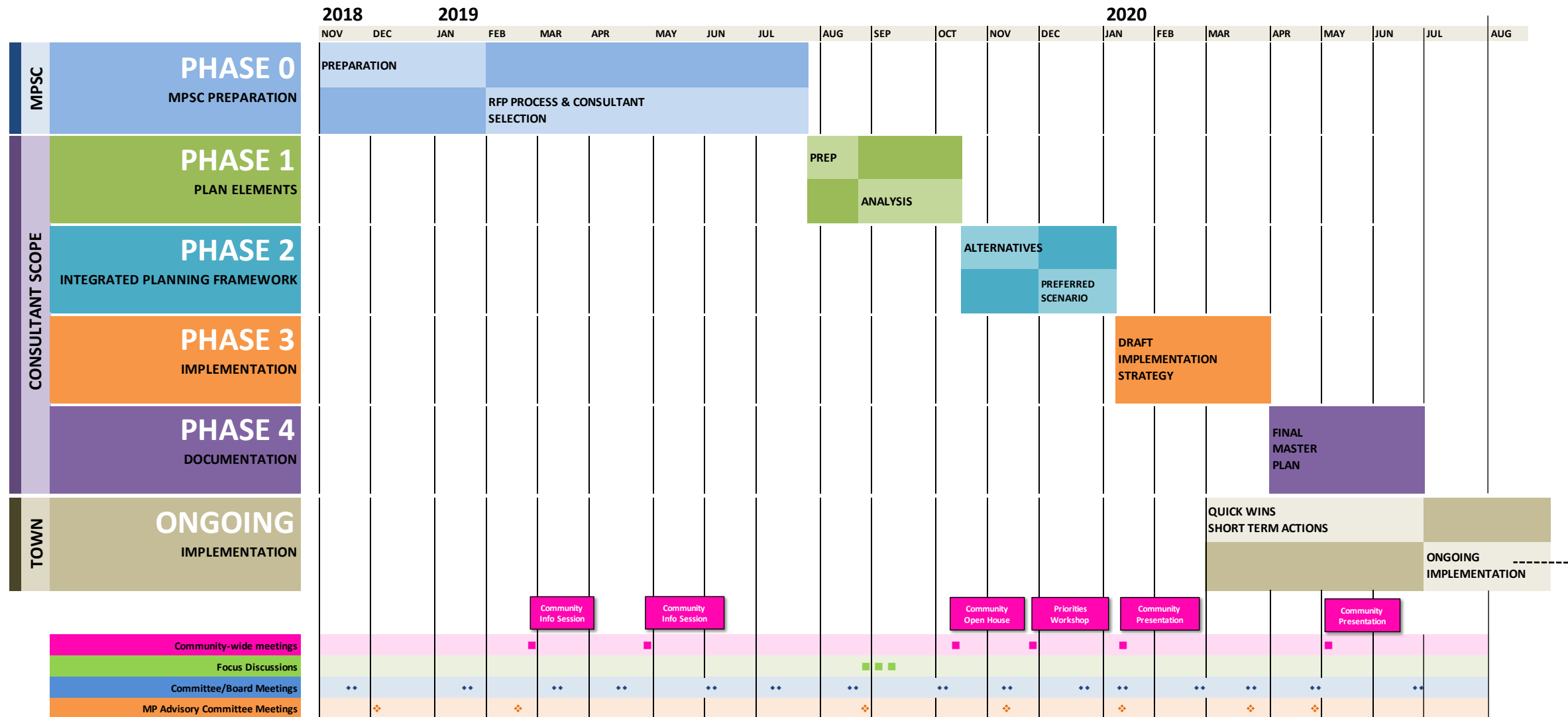
Community Interest/ Recurring Themes

- **Agricultural Uses:** Maintaining Carlisle's Rural Character
- **Conservation & Recreation:** Carlisle's Identity
- **Community Center:** Providing a New Facility for the Community
- **Creating Community:** Meeting the Social Needs of Carlisle Residents
- **Housing:** Diversity & Affordability that meets Carlisle's needs
- **Revenue Generating Opportunities:** Creative Solutions
- **Sustainability:** Economy, Environment & Community
- **Town Center:** Unlocking Potential
- **Transportation:** Creating More Options
- **Walkability:** Connecting Carlisle Neighborhoods



Overall Master Plan Process

- Phase 0 – MPSC Preparation
- Phases 1 - 4 – Planning Consultant-led MP process
- Ongoing – Implementation



Fee Estimate Overview

- Based on MPSC “Mock Up” of Work Plan Proposal & Fee Estimate
- Review of Comparable Town RFP’s/Plans/Fee Analysis
- Review by Planning Experts

PHASE 1: PLAN ELEMENTS	
1 Preparation	- a GIS Mapping - b Background Review
2 Analysis/Framing of Plan Elements	- a Current projects & plans - b Needs & Issues - c Barriers & Challenges - d Opportunities - f PPT Presentation
3 Community Engagement	1 Focus Discussions 2 Committee/Board Meetings 3 Community-wide meetings 4 MP Advisory Committee Meetings
PHASE 2: INTEGRATED PLAN FRAMEWORK	
1 Alternative Scenarios	- a Alternative Scenario Exploration - b Evaluate Scenarios
2 Preferred Scenario - Priorities	- a Refine Preferred Scenario - b Plan Priorities and Phasing
3 Community Engagement	- a Community-wide meetings - b Committee/Board Meetings - c MP Advisory Committee Meetings
PHASE 3: IMPLEMENTATION	
1 Draft Implementation Strategy	- a Long Term Plan - b 5-Year Action Plan - c Funding, Governance, Technical Studies
2 Community Engagement	- a Committee/Board Meetings - c MP Advisory Committee Meetings
PHASE 4: DOCUMENTATION	
1 Final Master Plan	- a Presentation - b Draft Report - c Final Report
2 Community Engagement	- a Community-wide Meeting - b Committee/Board Meetings - c MP Advisory Committee Meetings

Mock Up of Fee Estimate based on Work Plan

- Total estimated minimal fee of \$122,700 including \$116,850 for labor and \$5,850 for expenses (based on work plan & anticipated staffing)
- Anticipated expertise: Planning, Civil Engineering & Economic Strategy
- Total of over 1,000 hours of work anticipated at a blended hourly rate of \$109/hour

FEE ESTIMATE BY EXPERTISE

PLANNING (PRIME)	\$ 90,050.00
CIVIL ENGINEERING	\$ 12,900.00
ECONOMIC STRATEGY	\$ 13,900.00
TOTAL ESTIMATE FEE	\$ 116,850.00

FEE ESTIMATE BY PHASE

PHASE 1 PLAN ELEMENTS	\$ 39,000.00
PHASE 2 INTEGRATED PLANNING FRAMEWORK	\$ 30,200.00
PHASE 3 IMPLEMENTATION	\$ 20,700.00
PHASE 4 DOCUMENTATION	\$ 26,950.00
TOTAL ESTIMATE FEE	\$ 116,850.00

SUMMARY

TOTAL HOURS	1,072
BLENDED HOURLY RATE	\$ 109.00

Summary of Comparable Town Analysis

- Reliable data from four comparable towns: Concord, Boxborough, Bedford, and Harvard
- Consultant and staff time included
- Master plan costs range from \$143,000 to \$277,000

Town	RFP Date	Scope of RFP	Consultant Budget	Staff Time Budget Equivalency	MP Cost	Total MP Cost	Contract Time
Concord	12/15/16	Comprehensive Long Range Plan	\$ 120,000	Planning Director	\$ 59,089	\$ 277,133	16 months
			\$ 54,000	Town Planner	\$ 44,044		
				Former Town Clerk (Volunteer)	\$ -		
				2 Fin Com Members - survey	\$ -		
				MPSC Co-chairs	\$ -		
Boxborough	9/4/14	Master Plan Update	\$ 75,000	Town Planner	\$ 43,125	\$ 143,125	12 months
			\$ 25,000	6 employees to run meetings			
Bedford	4/27/12	Master Plan - Consultant Services	\$ 40,800	Planning Director	\$ 27,600	\$ 235,150	12 months
				Assistant Planner	\$ 51,750		
				Admin Assistant	\$ 69,000		
				Intern	\$ 28,750		
				GIS Analyst	\$ 17,250		
Harvard	8/29/11	Master Plan Phase 1 - Town Vision & Goals	\$ 35,000	Town Staff	\$ 1,869	\$ 210,181	18 Months
	7/22/13	Master Plan Phase 2 - Scope & Action Planning	\$ 100,000	Consulting Town Planner	\$ 73,313		
Acton		Master Plan Phase 1 - Community Outreach	None Referenced			???	12 months ish
	8/6/08	Phase 2 - Master Plan	\$ 140,000				
AVERAGE						\$ 216,340	

Fee Estimate Recommendations

- **\$122,700 - Based on MPSC Mock Up Work Plan & Fee**
- **\$143,000 to \$277,000 - Based on Comparable Plans**

**MPSC RECOMMENDATION:
\$135,000 budget**

Funding Request

DRAFT warrant article—Master Plan Funding

To see if the Town will vote to raise and appropriate, transfer from available funds, or borrow the sum of \$160,000 to be expended by the Master Plan Steering Committee for the costs associated with the preparation of a Master Plan, including consultant services and ancillary Town costs associated with the preparation and presentation of the plan and the management of the planning process, or to take any other action in relation thereto.

- **Consultant budget is \$135,000**
- **Planning Board asked us to include a \$25,000 contingency for town related costs**

Master Plan Outcomes

- Strategic Road Map for prioritizing and implementing town priorities
- Engagement of community leaders in ongoing town improvements
- Identification of priority projects w/ conceptual budgets & implementation steps
- Geographical Information System (GIS) Database updated
- Basis for comprehensive policy and zoning amendments
- Basis for updating Open Space/Recreation and Housing Production plans



OUTCOMES



www.carlisleplan.org