



WORK PLAN

Overview

As the prime consultant, Stantec will have overall responsibility for management of the entire consultant team and the writing and producing of the Unified Plan. Larissa Brown, PhD, AICP, will be the project director and manager for Stantec. Daphne Politis, AICP, of Community Circle will lead the organization and implementation of the community engagement process. Jane Wiseman will focus on town government strategies. The Stantec technical team will provide specific expertise, as will our advisors for infrastructure, transportation, economic development, housing, and real estate analysis. Key team members will participate in the community process and all members of the team will contribute to developing the overall strategies for the plan. Should grant funds be made available for a Community Health element of the plan, Larissa Brown and Daphne Politis, both of whom have experience in preparing health and human services elements of plans, will take charge of that element.

Stantec expects to meet regularly with the Town project manager and communicate as needed through email and telephone. We have found that it is useful to have a weekly telephone call to discuss project progress and issues.

Flexibility in allocation of resources and restricted funding

Community-based planning projects respond to issues that emerge from the community participation process, sometimes requiring rebalancing of activities. In collaboration with the Town, Stantec may identify the need to shift resources within the project in order to meet unforeseen needs as the project progresses. However, we understand that the funding for the Unified Plan will include Community Preservation funds that must be expended for historic preservation, housing, and open space/recreation purposes and that similarly, grant funds may become available for a health element. We will organize the work to align with these funding requirements and appropriately account for the funds.

Expectations of assistance from the Town

The consultant requests that the Town provide a staff person who will act as project manager and principal liaison to coordinate all aspects of the project with the consultant team. The project manager and the Town will be expected to assist the consultant team as needed in the following ways:

- » Providing access as needed to demographic and socio-economic data, GIS datalayers and map projects, assessor's data, regulations, previous planning documents, stakeholders' contact information, and so on

- » Assistance in making data and information held by other governmental bodies available to the consultant, as needed
- » Suggesting interview and focus group subjects, and potential members for working groups
- » Scheduling and providing space for interviews, focus groups and committee/subcommittee meetings
- » Logistics for public meetings, including identification and provision of Town-owned meeting space at no cost to the project
- » Attendance at Steering Committee and Working Group meetings
- » Attendance and assistance at public forums, workshops, and open houses
- » Documenting comments and requests for revisions during public review.

mobile-optimized websites and interactive online opportunities. Providing on-line opportunities for engagement also helps us to reach some demographics that otherwise are difficult to engage. At the same time, we recognize that some people do not have access to or prefer not to use online resources. The public engagement program, therefore, must be as diverse as the people we are trying to reach.

Daphne has worked in a wide range of municipalities with “hard to reach populations” and depending on the population has developed several techniques for reaching them. In addition to providing a range of options for participation that are widely publicized and accessible, she develops strategies to reach different target populations, such as seniors and youth. Different forums, modes and styles of communication may be necessary to reach a diverse audience.

Public Engagement Program Overview

In collaboration with Stantec, Daphne Politis of Community Circle will organize the public engagement program and be responsible for outreach. Daphne is highly experienced in developing and implementing community participation programs, both face-to-face and digital. Digital engagement has become increasingly important for busy residents, and we provide

We often invite the youth of a municipality to participate, both for their fresh ideas, and as a way attracting the attention of the adults. Town festivals and events are also excellent outreach opportunities.

Daphne will be supported by Stantec’s UPG and IEG’s Jane Wiseman will also participate in selected public events. Stantec’s UPG has developed and implemented outreach programs for multiple projects, and organized and facilitated hundreds



of interactive workshops and charrettes. We have interviewed and collaborated with a diverse array of local officials, stakeholders, neighborhood groups, and other community-based organizations in Massachusetts and around the country. Because of this long experience, we are skilled in building consensus in a context of multiple client groups and interests and multiple stakeholders, as will be the case in the Wellesley project.

Similarly, Jane Wiseman has worked closely with government stakeholders in a variety of contexts to develop and reach consensus to make government more effective. As Assistant Secretary for Public Safety in Massachusetts, she was charged with creating statewide strategic plans for each of the grant programs funded by the United States Department of Justice and Homeland Security. She had lead responsibility in the state for facilitating community discussions among interested stakeholders in law enforcement, religious and advocacy groups around the implementation of new protocols for traffic stops resulting from the state's the racial and gender profiling law. She was also responsible for facilitating community-based discussions in several communities for sex offender management programs. She has taught community-based strategic planning for state and local justice program administrators. She currently consults and writes about government innovation, data-driven government and customer-driven government.

We expect to develop the final public engagement program in discussion with the Steering Committee. The program will likely include all or some of the elements below.

- » **Steering Committee (SC).** The Town of Wellesley will appoint a Steering Committee (SC) with representation from the Town's 27 public bodies as well as a broadly representative group of residential, commercial, educational, institutional and community interests. The SC is expected to have 40-45 members. There will be approximately 10 meetings of the SC .
- » **SC Working Groups.** Because of the size of the SC, we propose creating up to four smaller

subcommittees to work on specific issues or topics to be identified during the course of the planning process. They will work closely with the subconsultants as they develop preliminary documents for the Unified Plan. There will be 4-8 working group meetings.

- » **Interviews and focus groups with key stakeholders and Town staff.** Individual interviews and focus groups with stakeholders, both SC members and others, will help the consultant team in updating information and identifying important issues and areas of concern.
- » **Brand and Logo.** The consultant team will develop a name and logo for the project, to be approved by the Town, with up to three options and three revisions.
- » **Public workshops and meetings.** The planning process will include the following public events:
 - *Townwide Visioning Forum.* A town-wide interactive public meeting to develop a vision for the future will take place on a Saturday.
 - *Four Neighborhood Workshops.* The town's 8 precincts will be divided into 4 planning districts made up of adjacent precincts with similar character. The Neighborhood Workshops will focus on issues and opportunities specific to each district.
 - *Four topic workshops.* The topics for the workshops will be identified in collaboration with the Steering Committee.
 - *Four Neighborhood Open Houses.* Drop-in open houses (located as in the Neighborhood Workshops) will present planning directions for comment by residents and stakeholders. One may focus specifically on the Town Government Strategic Plan.
 - *One business breakfast or lunch meeting.* Business owners typically do not attend meetings in the evening or on weekends. We have found that an early morning meeting, breakfast, or a lunch, perhaps sponsored by the Chamber, Rotary, or other similar group, is more effective.

- *Townwide Forum on the Draft Plan.* In an interactive public forum, the consultant will present the draft plan and provide opportunities for public comment.
- » **Presentations to community organizations.** If invited by community organizations, the consultant will make presentations or prepare the Town project manager for presentations.
- » **Public hearings/presentations.** The consultant team will present the Needs Assessment and Vision to public bodies and Annual Town Meeting, and the draft Unified Plan to the Planning Board, the Board of Selectmen, and Annual Town Meeting.
- » **Draft documents available for public comment.** Draft documents will be posted on the web site and hard copies deposited at the Wellesley Main Library to provide opportunities for public comment.
- » **Public participation outreach.** Our team will use multiple avenues, digital and traditional, to inform the public about the project and public engagement events. The consultant team will also employ outreach methods such as email blasts, the Wellesley Townsman, partnerships with schools, community organizations and businesses, and presence at town events. We expect that SC members and Town staff will assist in spreading the word about opportunities to participate in the Unified Plan process.
- » **Steering Committee (SC) speakers bureau.** Stantec will work with members of the SC to visit boards and commissions, committees, and important community groups and organizations at key milestones in the planning process to promote participation, report on the progress of the plan, and seek input.
- » **Digital engagement**
 - *Web site.* The consultant team will design a web page for the Unified Plan process on the Town's web site or create a separate web site optimized for mobile use. It will provide for comments, discussions, sign up for notifications and for contacting the consultant team, as well as a calendar of events, and a library of images, data and documents for download and comment.
 - *Keypad polling.* At SC meetings and public events, keypad polling for certain topics will provide real-time results for the participants.
 - *Social media.* The consultants will work with the Town to use the Town's Facebook and Twitter accounts for public information and to keep up public interest, and we will seek similar opportunities from the Wellesley Townsman, organizations like Sustainable Wellesley, and other groups.
 - *E-blasts.* Through the web page, stakeholder groups, sign-ups at meetings, and other methods the consultant team will develop and maintain an email list to inform interested persons about project activities and documents.
 - *Flash surveys of public opinion.* The team will work with the Steering Committee and the staff to identify key issues for quick surveys of public opinion at intervals during the vision and planning process. These surveys will be online and mobile-optimized, so they can be sent to the project's email list. Options could include creating a regular schedule to send out short questions on specific issues.
 - *Media.* The team will also perform the following tasks, subject to consultation with the Town: press release drafting and dissemination to media, via web communications and to stakeholders on e-contact list; use of Wellesley social media resources for outreach; informational programming; and presence on talk shows and similar events.

1 Phase I: Project Initiation & Needs Assessment/Current Conditions Analysis



Time Frame:
August – November 2016

A. Project kickoff meetings and finalization of work plan

The consultant will attend kickoff meetings with the Steering Committee to discuss the project work plan, community engagement plan, and the project schedule. After these meetings, the consultant will finalize the work plan, including community engagement, and project schedule.

B. Brand and logo

Stantec will develop up to three options for a project name or brand and corresponding logo for approval by the Town, with up to three revisions.

C. Website

Stantec will work with the Town to create a dedicated section of the Town's website for the Unified Plan project or a separate project website. We can also set up an associated discussion site (*mySidewalk*, formerly *MindMixer*). Through the website, town residents will have interactive opportunities in addition to access to presentations, draft documents, maps and other graphics.

D. Social Media

The team will work with the Town to take advantage of social media opportunities in Wellesley, such as existing Facebook and Twitter accounts owned by the Town and the Wellesley Townsman. Our experience is that providing information for accounts with existing followers is more successful than setting up new accounts for a project.

E. Steering Committee Meeting #1 with the consultant team

We suggest that the Town convene the SC for an initial meeting to elect co-chairs and discuss any questions about the committee's role. Then, the refined work plan, community engagement program, and schedule approved by the Town's project manager will be sent to the members of the Steering Committee in advance of the first meeting with the consultant team leadership group. The team's leadership group will be composed of the overall project manager (Larissa Brown of Stantec), the community engagement leader (Daphne Politis of Community Circle), and the Town Government Strategic Planner (Jane Wiseman of the Institute for Excellence in Government). The business of this meeting will be to introduce the team, provide orientation to the planning process and discuss any concerns or issues with the work plans and schedule. We also expect to include exercises, likely with keypad polling, designed to identify characteristics of the group, areas of general consensus, and areas where there are differing opinions.

F. Needs assessment/current conditions: data collection and analysis

The needs assessment and inventory of current conditions tasks will proceed on two simultaneous and interrelated tracks as the team updates data and information for the comprehensive plan and the Town Government Strategic Plan.

1. *Data collection and organization.* The consultant team, with the assistance of the Town's project manager, as needed, will collect information and data including existing plans, GIS data and map projects, socio-demographic data, economic data, Town ordinances and regulations, Town department strategic plans, Town financial data, and current projects. The team will also seek other relevant information, such as master plans for the educational institutions in Wellesley. Data collection will include use of proprietary information when needed, such as ESRI Business Analyst, Claritas, or EMSI economic data.

PHASE 2: VISION AND PRINCIPLES



Time Frame:
December 2016 – March 2017

Our team will work with the Steering Committee and the Town Project Manager to develop a kickoff program of interactive public events and associated digital activities after the completion of the Draft Needs Assessment Report. This set of events and opportunities for digital input will be promoted together through multiple channels, providing many ways to reach Wellesley residents and stakeholders.

We expect the proposed public engagement activities and events presented here to be refined and modified based on the results of the Needs Assessment and through discussion with the Steering Committee and staff.

A. SC Meeting #3

The team will send materials with details about the outreach program and the content of the events to SC members before this meeting. The meeting will focus on outreach and the organization and the proposed structure of the visioning events.

B. Townwide Visioning Forum

Daphne Politis, supported by Stantec, will organize and implement an interactive Townwide Visioning Forum to be held on a Saturday. Exhibits of analytical maps and other materials will be available for review. The Forum will begin with a brief presentation to set the context for the Unified Plan process, the challenges and opportunities that face the Town, and will include exercises with keypad polling that give participants the opportunity to see real-time responses by the group as a whole. This will then be followed by small group activities with facilitators. The meeting will be organized so that individual responses will be documented and participants will also be asked to identify priorities through group discussion. Participants will be asked to identify assets and areas of concern, both in terms of policy and places

to be located on a map. All groups will discuss the same questions; these will be conversational and designed to solicit shared values. Each participant will then have the opportunity to write a short personal vision for Wellesley and share it with their small group. This will be followed by a group priority-setting process. Finally, the small groups will present their priority results to the larger group. We will then take this input and develop a Vision Statement and related set of guiding principles and goals that will form the foundation of the Unified Plan.

C. Four neighborhood workshops.

After the Townwide Visioning Forum, Daphne, supported by Stantec, will organize and implement four interactive district workshops, with each district covering two precincts that are similar in character. The workshops will take place for approximately 2-1/2 hours on weekday evenings over the course of two weeks. Exhibits and handouts will be provided at each event. During the workshops, participants will have the opportunity to discuss and identify on maps the issues and priorities specific to their districts, as well as their thoughts about town government strategy and effectiveness. At each workshop there will be a brief presentation on current conditions in that area, along with information on relevant aspects of previous planning. Participants will work in small groups with facilitators and then report back to the group as a whole, with a final opportunity to rank overall issues and opportunities.

D. Business Community Breakfast or Lunch Meeting.

Peter Kwass of Peter Kwass Consulting, with support from Stantec, will organize a business community meeting, ideally in collaboration with the Chamber or another business organization. These meetings typically are most successful as breakfast or lunch meetings during the work week. The purpose of the meeting is to discuss the Unified Plan, identify issues important to the business community, and identify business people for potential additional interviews.

E. Digital workshops and mini-surveys

For those people who are unable to attend the visioning forum or workshops, the website will provide interactive exercises similar to those at the workshops for online submission of ideas, preferences, and priorities. These will be used to confirm, validate and refine the vision and principles developed based on the input received at the townwide visioning forum. Digital workshops widen the range of voices contributing to the plan and allow input from those whose schedules or mobility limit in-person participation.

We also expect to use mobile-optimized short surveys over the course of the visioning and plan development stage of the project. Wellesley stakeholders who sign up for these surveys will receive an email from time to time from the Unified Plan project with a link taking them to a survey of one to three questions, which they can easily answer on their smartphones.

F. Draft Wellesley Vision and Principles and Steering Committee Meeting #4

Based on the outcomes of the public meetings, and online comment, the consultant team will prepare a draft Vision and Principles statement for review by the SC. The consultant team will make revisions, if needed. The Vision and Principles will be presented in a miniposter in the form of an 11 x 17 one-page document with graphics showing the statement on one side and summarizing the process that led to

the statement on the other side of the handout. This document will be placed on the website and at the information hubs for public review, with outreach to encourage comment and distributed to Town staff and all public bodies.

G. Endorsement of the Vision and Principles by Town Boards and Commissions.

After committee and public comment and approval by the SC, the Vision and Principles will be presented to Town boards and commissions for endorsement as the official guiding framework of the comprehensive plan and the planning process.

H. Final Vision and Principles

The final Vision and Principles will incorporate any required revisions requested by the boards and commissions and approved by the Steering Committee (either through a digital approval process or, if needed, another meeting).

I. Annual Town Meeting presentation

The team leadership will present the Needs Assessment and Current Conditions Report, the community engagement process, and the Vision and Principles to Annual Town Meeting.

DELIVERABLES:

- » Outreach materials
- » Exhibits, handouts, PowerPoints for public meetings and to post on the website
- » (1) Townwide Visioning Forum
- » (4) Neighborhood Workshops
- » (1) Business Community Meeting
- » Digital workshop materials
- » Steering Committee meetings
- » Draft and Final Vision and Principles
- » Annual Town Meeting presentation



Phase 3: Plan Development



Time Frame:
March – December 2017

After endorsement of the Vision and Principles, we will work closely with the Steering Committee and staff to develop the elements of the comprehensive plan update, the associated town government strategy to achieve the vision, and the implementation and action plan. Through this process and further discussion with the Steering Committee, we will identify the issues that are the most complex and difficult to resolve or balance, and focus special attention on those difficult, high-priority issues. This may result in comprehensive plan elements beyond those required by the state or combined elements to highlight interrelationships. The description of the plan organization below will be subject to modification based on the public engagement process and discussions with the Steering Committee, Town officials, and Town staff.

During Phase 3, it is expected that there will be regular meetings of the Steering Committee or subcommittees/ working groups created from SC members to focus on particular issues. Town staff or especially knowledgeable stakeholders who are not members of the SC may also be invited to join a subcommittee/working group.

Proposed organization of the plan. The plan will be divided into sections containing one or more related elements. The introduction to each section will provide a summary of the main recommendations of the section and its relationship to other sections of the plan. Each element will include a set of goals, associated policies for decision makers, a set of key findings and challenges based on the Needs Assessment/ Current Conditions report, a summary of community priorities as gathered through public workshops, digital input, and SC discussions, and a set of strategies and actions to achieve the goals, with a priority ranking within the topic area covered by the element. Best practices in urban design, sustainability and resource-efficiency,

resilience, and equity considerations will be integrated throughout the planning process and the plan, and having more detailed discussion in particular elements.

We will build on existing plans and initiatives in order to ensure a strategic and coordinated approach to achieving the Wellesley vision. Recent work such as strategic plans created by Town departments, boards, commissions, and committees; the Route 9 enhancement study; North 40 Study; 900 Worcester Street study; the Open Space and Recreation Plan; and other local and regional plans, projects, and initiatives will all be reviewed carefully and integrated into the Unified Plan, as appropriate.

After the goals, policies and strategies have been developed for each element of the plan, the Steering Committee will go through a priority-setting process to reach consensus on identifying townwide high, medium and low priorities, which will inform the final section of the plan. This section will include three townwide elements: Future Land Use, Town Government Strategic Plan, and Stewardship and Implementation.

A. Develop goals, policies, strategies, and actions for the Unified Plan

The Unified Plan will cover all state-required elements as separate elements or integrated with other elements: goals and policies; land use; housing; economic development; natural and cultural resources; open space and recreation; services and facilities; circulation; and implementation. We expect that through the visioning process and work with the Steering Committee, we will identify the issues that are most difficult to resolve and involve require cross-cutting strategies and priority setting—and which will therefore require the most attention, discussion, and focus. This includes the development of systems to enhance Town priority-setting and decision-making, measure progress, and implement the Unified Plan.

Example Unified Plan Structure

The structure of the Unified Plan will emerge from discussions with staff and the Steering Committee, as well as the results of the visioning events. The structure below provides a potential organization of structure for the plan.

Executive Summary [Mini-poster (11" x 17") or short booklet]

How to Use This Plan

Part I. Setting the Stage

- » **Element 1 – Townwide Vision and Principles, Town Government Mission**
- » **Element 2 – The Community Speaks.** Description and results from the public engagement process.
- » **Element 3 – Wellesley At A Glance.** Summary of the Needs Assessment/Current Conditions Report (in full in an appendix).

Part II. Our Natural and Cultural Heritage

- » **Element 4 - Natural Resources and Environmental Constraints.** Building on the strategic plan and initiatives of the Natural Resources Commission, issues to be discussed include: landscape character; environmental assets and constraints; water resources protection; green corridors, existing and potential; conservation priorities.
- » **Element 5 - Historic Resources and Preservation.** Update historic resources, preservation initiatives, adaptive reuse, identification of preservation priorities.
- » **Element 6 – Open Space, Conservation and Parks Systems.** Building on the recent Open Space and Recreation Plan, issues will include walkable access and ParkScore (Trust for Public Land metric) level of service measures, maintenance and emerging recreation needs based on demographic or other changes, design principles, and priority setting.

Part III. How We Live

- » **Element 7 – Neighborhoods and Housing.** Analysis and recommendations on neighborhood character and housing, both market-rate and affordable; housing market demand and supply; forecast of future housing needs; continuing concerns about large houses in relation to character and the effectiveness of the large house review process; affordable housing, related state and federal requirements and guidelines, and innovative strategies such as community land trusts; and adaptive reuse of historic properties.
- » **[Potential element if funded] Community Health and Wellness.** Identify health conditions and future trends in Wellesley, activities of initiatives such as Healthy Wellesley, Town conditions and plans that support community health, measures of well-being across the community, and additional initiatives to support health and wellness.

Part IV - Prosperity and Opportunity

- » **Element 8—Economic and Commercial Area Development.** Overall economic development and support for the Town’s villages and commercial areas; identification of future economic opportunities, including for entrepreneurs and small businesses; redevelopment opportunities; strategies and actions to maintain the Town’s economic base.

Part V. Sustainable Systems and Networks

- » **Element 9—Mobility and Circulation.** Issues to be discussed include congestion, level of service and mitigation options; active transportation networks (pedestrian and bicycle); multi-modal level of service standards; complete streets, traffic calming and similar best practices.
- » **Element 10—Supporting Public Facilities, Services and Infrastructure.** Issues to be discussed include: municipal facility improvements; program evaluation, service delivery and program enhancements; water, sewer, and stormwater services and regulations, including green infrastructure.
- » **Element 11—Sustainability, Resilience and Green Practices.** Focus on energy- and resource-efficiency and renewable energy, climate change readiness and adaptation, and integration of natural systems into development. Issues to be discussed include: energy efficiency, renewable energy benefits and impacts, and practices such as green building opportunities; best landscape practices; Low Impact Development and green infrastructure stormwater management; climate adaptation planning.

VI. From Plan to Action

The final section of the plan brings together the physical planning recommendations from previous elements, the town government strategic plan, and the implementation plan

- » **Element 14—Land Use, Regulations and Community Design.** This element will include future land use principles; a future land use policy map/diagram; a future land use map (GIS) with generalized land use categories shown for all parcels of land; graphic concept plans or scenarios illustrating select exemplary opportunity sites; urban design principles and general guidelines; and zoning best practices.
- » **Element 15—Town Government Strategy and Stewardship of the plan.** Systems and procedures to enhance the effectiveness of Wellesley’s government and ensure that the plan remains a living document through use by Town government and regular public review, including integration of the Unified Plan priorities into departmental work plans and the capital improvement plan, structured communication, open data systems, benchmarks and metrics to monitor implementation, standards for compliance with plan policies, and procedures for plan amendments, revisions and regular updating.
- » **Element 16—Implementation Matrix.** Matrix of implementation actions, including capital improvements, keyed to the goals and strategies in the plan elements: What? How? When? Who? How Much? The matrix will identify priorities, existing resources, planning, and low cost/high impact actions.

B. Steering Committee and Working Group Meetings

During development of the Unified Plan first draft, the members of the consultant team will meet with the Steering Committee for discussion and guidance on plan elements. In addition, Working Groups focused on specific topics may be organized to include Steering Committee members, and, if appropriate, staff, representatives of regional agencies, and knowledgeable local persons who are not members of the Steering Committee.

C. Town government mission and effectiveness strategy

We admire the decision by the Board of Selectmen to develop and implement a Town Government Strategic Plan integrated with the comprehensive plan to create the Unified Plan. Given the wide variety of formats and styles currently used in the strategic plans of various individual department and commissions, an initial step will be to align the existing inputs into a standard format. We will work with the Steering Committee to provide a recommended template that departments and commissions will be invited to use to create strategic plans that will more easily feed into a Town-wide plan.

The vision for the future of Wellesley created as part of the Unified Plan will drive the Town-wide strategic plan. Further, the development

of goals and performance metrics for each of the components of the plan will be completed jointly. Additional activities for Town Government Strategic Plan, above and beyond what is already envisioned for the Unified Plan, will address the following objectives:

- » Evaluate the relative quality of services delivered by the town.
- » Evaluate current service levels and their relationship to current town priorities, finances, taxpayers and customers.
- » Provide a higher degree of understanding for decision-makers as they review services, facilities and governance based on priorities.
- » Articulate the value placed on high-priority services and the rationale if services are discontinued for lower-priority services.

Our team will provide guidance and advice on using data to assess quality of services provided by Town government leveraging best practices in the field such as stat programs. We will document best practices and provide reference templates and examples that will be helpful to Wellesley in evaluating the quality of services delivered by departments and commissions. We will provide benchmark data from other towns for selected activity areas. We will develop recommendations on improved processes for collection and analysis



of critical performance data so that the Town will be able not only to execute on top priorities, but also to share data with the public on progress toward goals. We will provide recommendations about the frequency and format of public reporting based on best practices as well as emerging promising practices among top innovators. This formal sharing of performance data will provide the infrastructure for discontinuing activities that are not providing results sufficient to justify their continued investment.

D. Four public workshops on topics of special interest

The team will organize and implement four public workshops on specific topics. The topics themselves will be selected based on discussions with the public and the Steering Committee as well as themes that may emerge during the research phase of the Inventory and Needs Assessment. Potential topics may include balancing development, conservation, and recreation; mobility and circulation; town government strategies; housing (affordability, teardowns, and other issues) and town character.

E. Public open houses on planning directions and digital input

As the goals and strategies are developed for the Unified Plan elements, the consultant team will organize and manage four public open houses in the four two-precinct districts to solicit public feedback on the planning directions that are emerging during the plan development process. These open houses will be drop-in events held in the evening over two weeks. At these events stakeholders can come to view, give their opinions

and discuss the strategies emerging in the topic-based comprehensive plan elements. The open houses will give them the opportunity to see how public input has been transformed into planning goals and strategies. These events will be organized with display boards showing the planning directions; self-directed exercises for participants to rank priorities; and the opportunity for participants to speak one on one with members of the planning team to give their thoughts about the emerging plan. These materials will also be posted on the web site in interactive formats that will make it easy to comment and identify priorities. Input from these sessions will be incorporated into the First Draft of the Unified Plan.

F. First Draft Unified Plan

The team will produce the first draft of the Unified Plan. The plan will include a variety of visual elements such as maps, diagrams charts, tables, and images (photos, photomontages, drawings, etc.).

DELIVERABLES:

- » Plan element outlines with goals and strategies for Steering Committee and Working Groups
- » Steering Committee and Working Group meetings
- » Outreach and implementation of topic workshops
- » Outreach and implementation of public open houses
- » Complete draft plan elements with goals, strategies, and actions, narrative, and graphics and first draft of the entire plan

4 Phase 4: Plan Review



Time Frame:
September – October 2017

A. Staff and Steering Committee Review of First Draft UP

The First Draft of the Unified Plan will be sent to staff and to the Steering Committee for review. The review of the UP will be accomplished in stages over up to four Steering Committee meetings.

B. Revisions and Creation of Approval Draft UP

The team will revise the First Draft Plan as directed by the Steering Committee and staff and prepare an “Approval Draft” that will be the draft for public review, and the approval process by the Planning Board and Board of Selectmen.

C. Preparations for second Townwide Forum

A second Townwide forum will be organized in order to present the Approval Draft of the plan to the public. The team will prepare exhibits, a presentation and exercises to elicit responses from the public. Digital, traditional and media outreach will be used to inform the public.

D. Second Townwide forum and public review month

At the public forum, the team will provide exhibits in the form of graphic presentation boards on the plan elements, with opportunities for public comment, and then present the plan. Participants, seated at tables, will be asked to complete exercises to respond to the major directions of the Approval Draft of the Unified Plan – both individually, and

together as a group at the table. The group exercise will require participants to exchange perspectives with one another as they consider the draft plan. The forum will also provide an opportunity for questions at the event.

This event will start a one-month public review period for the Approval Draft of the plan. It will be made available to the public for review on the web site, at the Wellesley Main Library and Town Hall, with outreach to encourage review and comment.

E. Documentation of public comment

All comments received through the web site or by any other means, will be documented by staff and the consultant. The comment document will be in the form of a matrix that will include columns for consultant response and recommendation on comments, and a staff recommendation to the Planning Board and Board of Selectmen. This documentation will be posted on the web site and provided to the Planning Board, and Board of Selectmen.

F. Presentation of Approval Draft UP to Town Public Bodies for endorsement

The draft will be presented to Town Public Bodies for endorsement in early 2018.

DELIVERABLES:

- » Revisions responding to staff and SC comment
- » Approval Draft
- » Outreach, materials, and implementation of second Townwide forum
- » Documentation of public comment
- » Presentation to Town bodies

5 Phase 5: Final Approval and Production



Time Frame:
February – March 2017

A. Presentation to Planning Board and Board of Selectmen

The team will present the Unified Plan to the Planning Board and to the Board of Selectmen for approval.

B. Revisions as needed and production of final plan after approval

Stantec will make any revisions required by the Planning Board and Board of Selectmen. The final plan will be an electronic version of the plan in PDF and editable format; GIS data in ArcView format; and one digital copy of tables, charts and graphs, images, maps, boards, PowerPoints and similar presentation materials in editable formats and PDF, as needed. One unbound and one bound hard copy will be provided, with additional copies to be printed and bound at cost.

C. Presentation of Unified Plan to Annual Town Meeting

Stantec will present the Unified Plan to Annual Town Meeting, expected to take place in late March/early April of 2017.

DELIVERABLES:

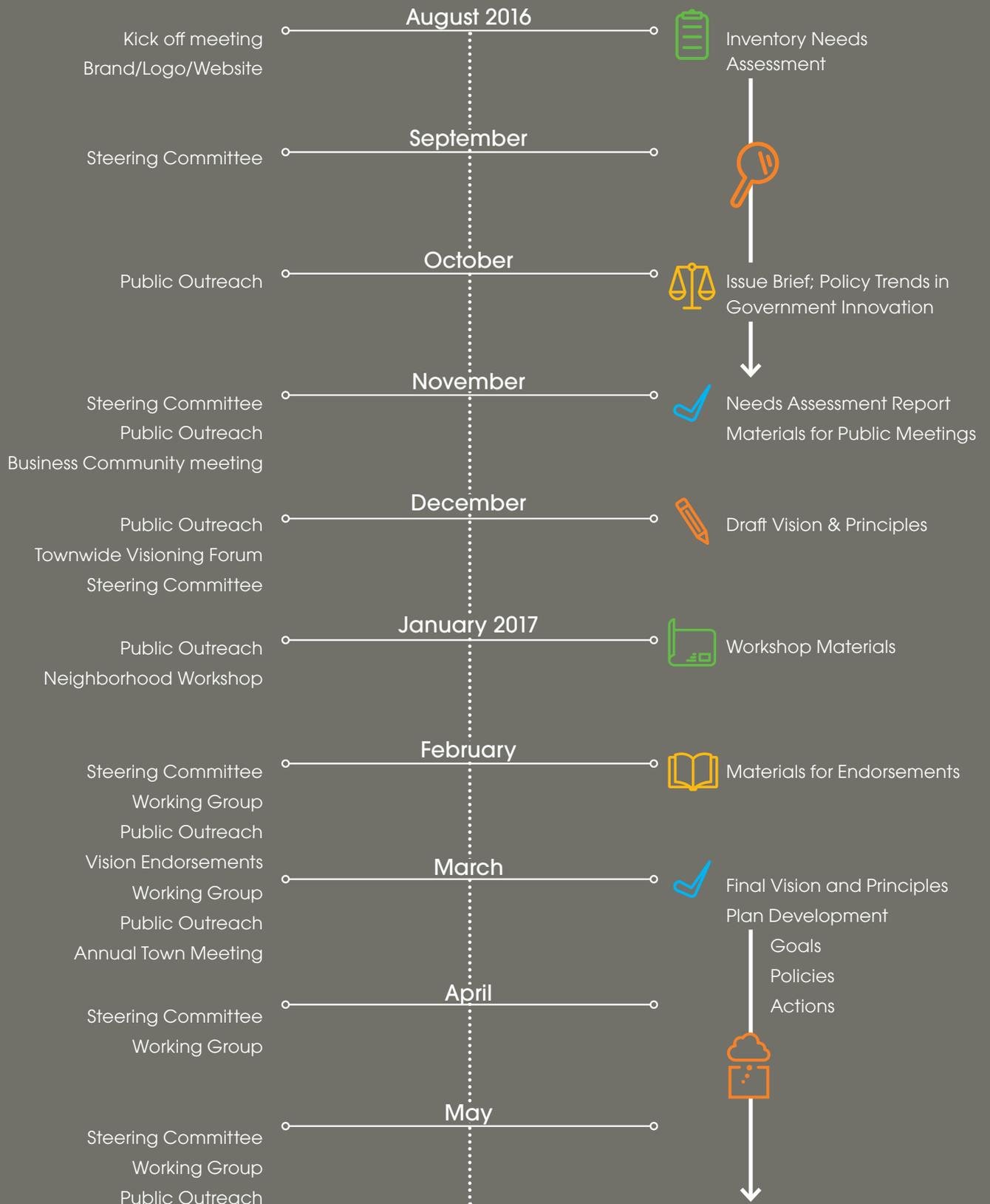
- » Presentations of the Unified Plan to the Planning Board, Board of Selectmen and Annual Town Meeting
- » Revisions, as needed, and final electronic and hard copies of the plan
- » Transfer of maps, boards, presentations and similar files to the Town.

Schedule

The following pages show our proposed schedule of tasks, public meetings, and milestone deliverables.

Outreach–Meetings–Approvals

Unified Plan Development



Outreach–Meetings–Approvals

Unified Plan Development

