

Proposed Scope & Process for the Development of A Unified Plan for the Town of Wellesley - 2018 to 2028

INTENT

The intent of this document is to **establish an agreed scope and process** that will serve as the basis for a Request for Proposals for the **collaborative development of a long-range Unified Plan for the Town** that will **encompass the required elements of a Comprehensive/Master Plan and a Town-wide Strategic Plan**.

STATUTORY REQUIREMENTS

While planning for the future of the Town is considered a best-practice, the Planning Board and Board of Selectmen (with the adoption of a new Bylaw proposed by the Town Government Study Committee) are required to establish long-range plans for the Town.

The Comprehensive/Master Plan

Under Massachusetts General Laws Ch. 41, Sec. 81D, the Planning Board is charged with preparing a master plan (or Comprehensive Plan, as it is commonly known and referred to in Wellesley) for the Town, serving as a **“statement, through text, maps, illustrations or other forms of communication, that is designed to provide a basis for decision making regarding the long-term physical development of the municipality.”** While not limited in its content, it is mandated that the master plan address the following 9 elements:

1. **Goals and policies** of the municipality for its future growth and development;
2. **Land use plan element** which identifies present land use and designates the proposed distribution, location and inter-relationship of public and private land uses;
3. **Housing element** which identifies and analyzes existing and forecasted housing needs and objectives including programs for the preservation, improvement and development of housing;
4. **Economic development element** which identifies policies and strategies for the expansion or stabilization of the local economic base and the promotion of employment opportunities;
5. **Natural and cultural resources element** which provides an inventory of the significant natural, cultural and historic resource areas of the municipality, and policies and strategies for the protection and management of such areas;
6. **Open space and recreation element** which provides an inventory of recreational, resources, and open space areas of the municipality, and policies and strategies for the management and protection of such resources and areas;
7. **Services and facilities element** which identifies and analyzes existing and forecasted needs for facilities and services used by the public;
8. **Circulation element** which provides an inventory of existing and proposed circulation and **transportation** systems; and
9. **Implementation program element** which defines and schedules the specific municipal actions necessary to achieve the objectives of each element of the master plan. Scheduled expansion or replacement of public facilities or circulation system components and the anticipated costs and revenues associated with accomplishment of such activities shall be detailed in this element. This element shall specify the process by which the municipality's regulatory structures shall be amended so as to be consistent with the master plan.

The Planning Board last developed a Comprehensive Plan for the Town in 2007, a 10-year Plan known as the Wellesley Comprehensive Plan: 2007-2017 Update, and intends to update that Comprehensive Plan in concert with the development of the Town-wide Strategic Plan, to result in the development of a Collaborative Unified Plan.

The Town-wide Strategic Plan

Currently, there is no requirement for a Town-wide Strategic Plan; however, a new Bylaw proposed by the Town Government Study Committee (Article 19.12) would require the Board of Selectmen to prepare such a plan (updated every 5 years) that will be a **“holistic, integrated agenda for the Town that reflects the goals, objectives and strategies that may be adopted from time to time by Town boards.”** Further, the Bylaw would require the Plan to include:

1. An articulated **long-range vision** for the Town;
2. A **mission statement of Wellesley Town government**, including a statement of purpose(s) describing the **functions of the municipal government** and for whom it provides those functions;
3. A specification of **broad community goals and priorities**;
4. A **statement of objectives**: identification of **deliverables**, both products and services to be provided;
5. **Strategies** by which objectives and goals will be achieved and by whom, as well as a **timeline for action**;
6. Recommended **action items** for **coordinating** and **integrating** board or departmental **objectives within a Town-wide context**;
7. Existing or anticipated **financial constraints** on the ability of the Town to pursue the objectives of the Strategic Plan and how those constraints will be addressed;
8. **Specific and measurable metrics** for assessing progress at agreed-upon time intervals; and
9. Such other matters as are deemed appropriate by the Board of Selectmen.

Regardless of whether this Bylaw is adopted by Town Meeting, the Board of Selectmen believes the development and implementation of a Town-wide Strategic Plan is necessary, has endorsed the proposal, and fully supports the Bylaw's requirement that preparation of the Plan involve consultation with “Town boards and department staff, as well as residents and other constituencies and stakeholders.”

GUIDING PRINCIPLE

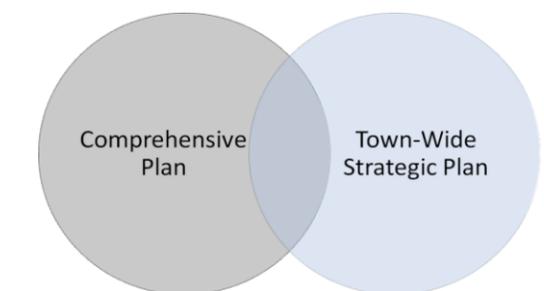
Recognizing the statutory obligations, along with the interrelatedness between the elements of the two plans with respect to vision-setting, data collection, public input, and establishment of goals, objectives and action steps, the Board of Selectmen and the Planning Board endeavor to develop an internally consistent, unified visionary plan for the Town.

GOALS OF THE UNIFIED PLAN

The Unified Plan will accomplish the following goals:

1. **Establish a vision for the future of Wellesley** that articulates the core values of all Town constituencies;
2. Provides a basis for decisions regarding the **long-term physical development and preservation of properties within the Town, both public and private**;
3. Provides a basis for decisions regarding the **prioritization, funding and provision of services, both infrastructure and human-related**, within the Town;
4. Provides a basis for decisions regarding the **use, maintenance, improvement, replacement, and sale of property and infrastructure** owned by the Town;

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5. Provides a basis for **long-term financial decisions, and accountability for such decisions**;
6. Assists in forecasting **long-term investments in and resource allocation for infrastructure and services; and**
7. Establishes **metrics and benchmarks for all departments, programs, and service delivery**.

SCOPE OF THE UNIFIED PLAN

The Unified Plan will include the following elements, exploring connections and synergies between the elements (such as assessing the benefits of open space to sustainability and economic development, or the importance of transportation and circulation to housing) and thereby reducing the potential for conflicts among the various policies, recommendations, and strategies. Further, during the vision-setting phase, consideration will be given to establishing specific themes which may be used to evaluate elements of the Unified Plan and the policies advanced therein. Finally, the Unified Plan will recognize and coordinate current planning efforts, and establish guidance for future Town-wide planning initiatives.

1. Long-Range Vision & Mission
 - a. Establish a **long-range vision for the Town**, from an **organizational perspective, a development perspective, and a human perspective**;
 - b. Establish **mission and purpose statements for Town government**, describing the functions of the government and for whom it provides those functions;
2. Goals, Policies, & Priorities - Establish **broad community goals, policies, and priorities**, including, but not limited to, the following:
 - a. **Future development**;
 - b. **Land use**;
 - c. **Housing**, including, but not limited to, affordability, diversity, accessibility, and character;
 - d. **Economic development**;
 - e. **Natural, cultural, and historic resources**;
 - f. **Open space and recreation**;
 - g. **Educational opportunities**;
 - h. **Community and economic diversity**;
 - i. **Circulation, transportation, and accessibility**;
 - j. **Sustainability**, both ecological and community health;
 - k. **Community Services, facilities, and programming**, including, but not limited to, education, infrastructure, recreation, and health and wellness;
 - l. **Financial management planning**; and
 - m. **Government efficiency, innovation, communication, engagement, and collaboration** within the local and regional community.
3. Implementation Plan - Develop **Action Steps, Performance Measurement and Reporting Requirements**
 - a. Establish a **statement of objectives, identifying deliverables**, both products and services, to be provided;
 - b. Establish **strategies by which goals, policies, and objectives will be achieved** and by whom, as well as a **timeline for action**;
 - c. Recommended **action items for coordinating and integrating board or departmental objectives** within a Town-wide context;
 - d. Formalize process and procedures for integrating with the Town's **long-term financial and capital planning**, including, but not limited to, the Town-wide Financial Plan, Annual

- Operating Budget, 5-Year Capital Program Budget Plan, Town-wide Asset Valuation, and overall financial position;
- e. Identify existing or anticipated **financial constraints** on the ability of the Town to pursue objectives, identify **how those constraints will be addressed**;
- g. Establish **specific and measurable metrics for assessing progress** at agreed-upon time intervals; and.
- h. Develop standard **reporting requirements for annual and 5-year reports** to Town Meeting

PROCEDURAL REQUIREMENTS

The following procedures will be included in the development of the Unified Plan:

1. The **Working Group will coordinate the advancement of the Unified Plan until the establishment of the Steering Committee**.
2. The Unified Plan will be **developed with the assistance of a consultant(s), engaged jointly by the Planning Board and the Board of Selectmen**.
3. **A brand will be created for the Unified Plan**, establishing that it is a separate, distinct, and all-encompassing document for the Town;
4. A **Steering Committee will be appointed** jointly by the Planning Board and Board of Selectmen to act **as a steward in the development of the Unified Plan**, directing the work of the consultant. The Steering Committee will include at least **1 representative from each Town board/committee, 1 Town Meeting representative from each precinct, and representatives of residential, commercial, educational, and institutional interests**;
5. Development of the Unified Plan will include an **introductory, vision-setting phase** to set the expectations and themes for the Unified Plan, an **inventory and assessment phase**, and a **goal setting and implementation development phase**;
6. The **public will be integrally engaged** in all aspects of the development of the Unified Plan; and
7. The Unified **Plan must ultimately be approved by the Planning Board and the Board of Selectmen**, but only after **endorsements by each Town board**. Following Planning Board and Board of Selectmen approval, the Unified Plan will be presented to Town Meeting.

MILESTONES & TIMELINE

Development of the Unified Plan is expected to include the following milestones and meet the noted timelines:

- **Review & Seek Agreement of Plan Scope with BOS & PB:** October-December 2015 - *Partially Complete*
- **Notify Town Government Study Committee of Intent:** October 2015 - *Completed*
- **Budget Development and Budget Request Presentations:** December 2015 to 2016 ATM
- **Initial Discussions with Town Boards:** December 2015 to February 2016
- **Pursue Full Funding at Town Meeting:** 2016 ATM
- **Appoint Steering Committee:** May 2016
- **Release RFP:** June/July 2016
- **Engage Consultant:** July/August 2016
- **Phase 1 & 2 (Vision, Inventory & Assessment):** September 2016-February 2017
- **Present Vision and Inventory & Assessment Report to Town Meeting:** 2017 ATM
- **Phase 3 (Goal Setting and Implementation Development):** March-December 2017
- **Present Full Plan to Town Boards for Endorsement:** December 2017 to February 2018
- **Board of Selectmen & Planning Board Approval of Plan:** February to March 2018
- **Present Plan to Town Meeting:** 2018 ATM
- **Plan Priorities Factored into FY20 Budget**

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FUNDING

A total budget of \$150,000 is expected to be necessary for the development of the Unified Plan. Currently, \$30,000 in Capital Budget funds were allocated to the Planning Board at the 2015 Annual Town Meeting. **CPA funds will be considered for some aspects of the Plan**, as well as other grant and funding opportunities. Since the Unified Plan is intended to be viewed a Town-wide document and resource, any funding requests should be viewed in a similar manner, rather than a request of a particular board or department.

Total Budget: \$150,000

FY16 Capital Budget Appropriation: \$30,000

Potential FY17 CPC Appropriation: \$60,000 *(to be used for planning activities associated with Open Space, Historic Preservation, Community Housing, and Outdoor Recreation)*

Remaining FY17 Capital Budget Appropriation: \$60,000

This document was prepared by:

Unified Plan Working Group

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