

## E. Scope of Services

The Planners Collaborative Team (Planners Team) proposes to prepare a Master Plan that results in an effective planning and decision-making process for recognizing and resolving the various development issues that face the Town of Acton. We will use the best available planning standards and principles and apply our knowledge of funding sources and programs for plan implementation.

Our proposed methodology for the preparation of Acton’s Master Plan has several steps that lead from the preliminary vision and goals established in the Phase 1 process to a validated set of vision, goals, and action plan, as follows:

1. Create a framework that fosters engagement of all members of the community in what we call “Community Conversations.” The key parts of the framework are a continued community process and ongoing public education about the subjects needed to fully participate in the community conversations, beginning with sustainability (see discussion below under task 1).
2. Prepare an inventory and analysis of the traditional master plan categories to provide needed information.
3. Use the analysis to identify opportunities, challenges, and potential actions.
4. Evaluate the outcomes of the potential actions.
5. Work toward consensus through the community conversations to an overall strategy and prioritized set of action recommendations (the implementation plan).
6. Validate the recommended actions through public meetings and an opinion survey, and revise as necessary.
7. Prepare a final narrative using an overall theme (such as sustainability) to unite the plan into a coherent whole.

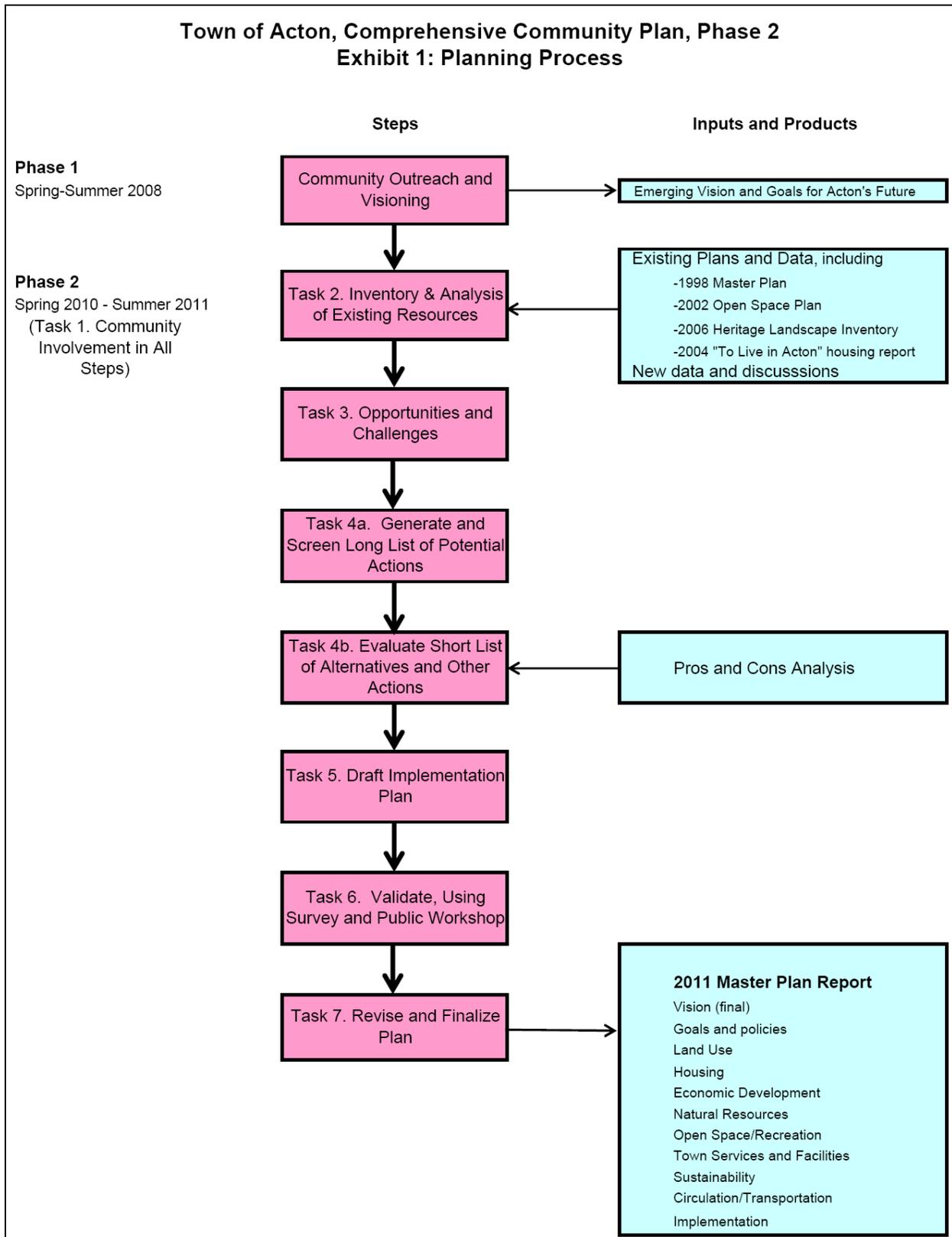
### *Strategic Planning*

The methodology is an example of “strategic planning,” customized to fit the particular needs of the Acton Phase 2 Master Plan. In fact, we at Planners Collaborative believe that all plans should be strategic: that is, they should be based on clear goals and objectives, include an analysis of opportunities and constraints, consider a structured set of alternative actions (generally with screening from a long list to a short list), evaluate the costs and benefits of the actions, and create a prioritized set of recommendations that is budgetarily constrained.

### *Schedule and Milestones*

This methodology is illustrated in the accompanying flow-chart (Exhibit 1) and the proposed project schedule (Exhibit 2, fold-out). As shown in these figures, the primary tasks are sequential, except for Task 1, Community Outreach, which continues throughout the project. Within Task 2, Inventory and Analysis, work will be concurrent in all master plan elements. Milestones for Tasks 2 – 7 are generally the public workshop or meeting following the task bar in the schedule. Dates for each task are provisional on the assumed start date May 1, 2010;

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# Town of Acton, Comprehensive Community Plan, Phase 2

## Exhibit 2: Schedule of Activities



\*Additional Board/Committee and Department meetings may be scheduled as necessary.

**Town of Acton Comprehensive Community Plan, Phase 2**  
**Exhibit 3: Proposed Staff Hours**

	<b>Team Hours</b>	<b>Purdy</b>	<b>Barber</b>	<b>Giezentanner</b>	<b>Schwartz</b>	<b>Politis</b>	<b>R. Ruth</b>	<b>Buxton</b>	<b>Hersey</b>	<b>Anthony</b>
Task 1. Community Outreach	342	80		20		150		16	40	36
Task 2. Inventory & Analysis										
Demographics	21	1	20							
Land Use	76	8		42		4	2		20	
Housing	76	4	44	12		4			12	
Economic Development	90	4	58	8		4			16	
Natural Resources	49	3		28		2			16	
Open Space/Rec	52	4		30		2			16	
Cultural Resources	32	4		8		4			16	
Facilities/Services	40	4		8	8	4			16	
Transportation	48	4		16	8	4			16	
Sustainability	44	24				4			16	
Task 3. Opportunities & Challenges	50	8	8	8	8	10			8	
Task 4. Evaluation of Actions	84	20	8	8	8	10	2		20	8
Task 5. Draft Implementation Plan	98	40	8	8	8	10	8		8	8
Task 6. Validation (survey)	56	4	48			4				
Task 7. Draft & Final Report	162	32	8	8	4	24		16	30	40
<b>Total Hours</b>	<b>1,320</b>	<b>244</b>	<b>202</b>	<b>204</b>	<b>44</b>	<b>240</b>	<b>12</b>	<b>32</b>	<b>250</b>	<b>92</b>

adjustments may be needed in the schedule to accommodate holiday periods when it is not recommended to conduct public meetings.

Exhibit 3, Proposed Staff Hours, is a matrix that breaks down the effort by team member and by task and subtask. Except for Daphne Politis, hours for meetings are included in Tasks 2 – 7; Task 1 hours for other staff are associated with planning and producing graphics and other materials for the meetings.

## **Task 1: Develop a Framework for Community Conversations on the Master Plan**

### **1.1 Continuing Outreach to Residents, Businesses, and Town Boards and Committees**

We will develop a Community Outreach Plan for Phase II that will be a continuation of the intensive outreach of Phase I, will continue to engage residents who do not usually participate in town affairs, and will instill interest, educate, inspire enthusiasm, increase public awareness on a number of relevant topics. This will eventually generate a sense of ownership of the plan's recommended actions and initiatives because citizens will have provided their informed input, understood the plan's recommendations, and will therefore support their implementation.

Phase I of the Comprehensive Community Plan initiated a community conversation with residents, businesses and town government regarding the future of the Town. This communication was conducted in both conventional ways (e.g., meetings) as well as by providing alternatives to attending meetings (e.g., by responding to a mail survey, a comment board, etc.). We conducted targeted outreach to members of the community who do not regularly participate and/or who have a particular experience of the Town (e.g., ethnic groups, Rotary Club, seniors). We have identified what worked well for getting residents to meetings (e.g., flyers in school backpacks and disseminating information at the transfer station) and we have developed relationships with key individuals such as the Editor of the Beacon and "leaders" in the various ethnic communities in Acton. We believe this prior work and experience in conducting outreach in Acton gives us a tremendous advantage in continuing to outreach, especially given the Town's interest in continuing to engage its citizens in an extensive and comprehensive manner.

We will identify which stakeholders have tended to participate less and help the Steering Committee to reach out to them. Together we will determine the best use of the project resources to provide a wide range of participation modes offering variety in the degree and ways in which people can provide their input.

We propose to hold five widely publicized public meetings. For each meeting we propose that there be a background briefing on a particular relevant topic as the opening segment to the meeting, followed by an interactive workshop format with multiple opportunities for public input. Background documents will be posted on the town website prior to the meetings. While the exact schedule and specific agendas for the meetings are subject to discussion with the Steering Committee and the Planning Department, we propose a preliminary schedule (see Exhibit 2) and the following thoughts on a preliminary agenda for the meetings:

<b>Public Meeting/ Workshop</b>	<b>Suggested Topic(s)</b>	<b>Background Briefing Documents</b>
#1	Confirmation of Vision & Goals  Presentation of Preliminary Findings from Inventory & Analysis <ul style="list-style-type: none"> <li>• Identification of main issues</li> <li>• Implications of findings</li> </ul>	1) Summary of Phase I Vision & Goals  2) Sustainability
#2	Summary of Opportunities & Challenges posed by findings of Inventory  Presentation of Preliminary Recommendations <ul style="list-style-type: none"> <li>• Explanation of how recommendations reflect Vision and Goals.</li> </ul>	1) Summary of Opportunities & Challenges posed by findings of Inventory  2) What is A Master Plan, land use law, town’s resources & related constraints, etc.
#3	Presentation of Refined Recommendations <ul style="list-style-type: none"> <li>• Prioritization of action steps for phasing purposes (timing)</li> <li>• Focus on specific action steps that need further discussion (either due to complexity of issues involved or lack of consensus)</li> <li>• Discussion of precedents (responses to similar issues in other communities)</li> </ul>	1) Identification of relevant issues, which may include constraints of the law, fiscal constraints, funding sources, etc.
#4	Review Implementation Plan <ul style="list-style-type: none"> <li>• Prioritization exercise using budgetary constraints as way of prioritizing</li> <li>• Review of action steps, responsible parties, phasing, and funding sources if relevant</li> </ul>	1) Feasibility, Phasing & implications of planning choices
#5	Present Final Plan <ul style="list-style-type: none"> <li>• Ask for final input</li> </ul>	1) Presentation of Next Steps – how to implement, formation of Master Plan Implementation Committee, etc.

Workshop #1 is an important point in the planning process when the vision, goals, and objectives in the Phase 1 “Emerging Vision and Goals for Acton’s Future” should be advanced beyond the “emerging” stage and confirmed so that they can be used to evaluate potential actions in Task 4. Some adjustments may be necessary in later tasks, and the final statement of vision, goals, and objectives for the comprehensive community plan will occur following the validation of goals and recommendations in Task 6.

**Publicity.** We will use methods that worked well in Phase I including the banners and streetlight pole flags, newspaper ads, flyer distribution and posters in public places.

**Town Government.** We propose to follow up the Roundtable Discussions held in Phase I with Town Department Heads and Town Boards, Committees, and Commissions with two additional meetings where we propose to discuss priorities, potential ways of sharing resources, and costs (among other topics).

**Youth Participation.** We propose to continue to engage the youth of Acton in the planning process. Their response to Phase I was enthusiastic and impressive. We would like to provide them with additional opportunities to participate in the process and to provide us with their input. We will work closely with a member of the Steering Committee who will work as the “youth liaison”, communicating with teachers and school administrators in order to ensure that their participation is meaningful.

We will hold seven meetings with the **Steering Committee** scheduled to facilitate discussion of the work in progress and the results of the public meetings. We will also post written materials on the town’s **project website** that will summarize the planning process, and the results of public meetings on the plan, and offer each viewer a chance to provide comments on the materials and the content of the plan.

The outcome of the planning process will be heavily influenced by the experience gained in the public participation process. We have experience in conflict resolution, and consensus building in suburban communities such as Acton. We have used a combination of surveys, public meetings, group and individual exercises and consensus forming techniques in past projects, to gain the agreements necessary to produce plans that receive wide community approval.

## **1.2 Educational Activities on the Essentials of Town Planning**

The RFP emphasizes the importance of the outreach process as a series of opportunities for education. We will incorporate educational segments (which we call “background briefings”) in each of the public workshops in units that relate to the questions about which we are inviting the participants to get engaged. For example, we propose to cover key features of land use law prior to discussing growth management and design review and to present the fundamentals of municipal budgets before discussing recommendations for facilities and services. The educational presentations and Q&A will be designed to address key aspects of the workshop topics in a brief and interesting way so that no more time is used for this purpose than necessary; 20 minutes is a suggested time slot. To the extent possible, documents prepared for these meetings will be made available ahead of time on the web and at Town Hall. Suggested topics for the briefings are shown in the table above. An example of such a background briefing is described below in Task 2.9, Sustainability.

We believe the first educational opportunity should be part of a workshop to reach a common understanding of what sustainability should mean for Acton. Sustainability can be an overarching theme that creates a “big picture” and unites the parts of the master plan; whether it is the right choice of theme is a question to be discussed and decided in the master plan Steering Committee. Participants in Phase 1 showed a very high level of interest in the subject and as planners we believe sustainability is a critical perspective that is needed to guide action at every level from the household, the community, the nation, and globally.

## **Task 2. Inventory and Analysis**

This task provides the base of data needed to have an effective discussion of issues and potential actions to address them. The discussion below is organized around the elements of the master plan. To avoid fragmenting the discussion, these sections also refer to work which will be done in the subsequent tasks to apply the inventory and analysis work as opportunities and challenges are identified, and potential actions are developed and evaluated.

A basic source of information with which to begin the inventory is the set of completed plans that have been prepared by the Town over the past several years. These include the 1998 Master Plan Update, the “To Live in Acton” report on housing and economic development, the DCR Heritage Landscape Study, and the Open Space and Recreation Plan prepared in 2002 and the 2008 update which is expected in the fall. In addition, we will depend on the new Acton GIS system to provide property lines, building footprints, and other data layers to which we will add. We also anticipate using building permit data and records of the Planning Board, ZBA, and Design Review Board to gauge recent development activities.

The budget and work plan for inventory and analysis is based on the assumption that the basic data will be provided by town departments and committees. The types of data will be as requested by the Acton Planning Director in his January 2010 information requests, but only raw data in readily available formats will be requested. The Collaborative team will analyze, refine, and format the data provided, add regional comparisons where relevant, and write the Inventory and Analysis sections of the Master Plan update. In addition to utilizing the data provided by the town, we will hold cluster meetings with groups of town department heads to discuss and amplify their data.

### ***Further Use of Phase 1 Surveys***

An important part of this task which bridges across all topics is the further analysis of the Phase 1 survey results to add depth to our understanding of Town preferences and values as they apply to the master plan elements. This further consideration of the surveys will include cross-tabulating opinions by characteristics such as age of respondent, length of residence in Acton and other characteristics, or by comparing responses to pairs of questions.

### **2.1 Natural Resources**

The analysis of natural resources will expand upon the present data by making extensive use of the materials already prepared by the U.S. Natural Resources Conservation Service, the Federal Emergency Management Agency, and the MA Department of Environmental Management and MassGIS on wetlands, floodplains, soils, water, and land, and of readily available other natural

features mapping and inventories. Analysis will be done in terms of the conditions of, and threats to, natural resources, the measures needed to protect them, the role these resources play in town functioning (e.g., water supply), and the value that town residents place on them.

This analysis will include the ability to meet future water and wastewater needs while protecting natural water resources. Lastly, an analysis of water quality that addresses the non-point source pollution loading and water quality impacts of development will be considered. Separate maps will consist of environmental factors, such as topography, flood plains and stream buffer zones, vegetation, and wildlife, which will bear on how and where land may be developed.

A preliminary implementation and natural resource protection strategy, including the relative reliance on zoning, subdivision regulations, environmental controls, and overlay districts, such as those for aquifer protection and flood plain will be defined at this point.

Overlays will consist of environmental factors, such as topography, flood plains of streams, vegetation, soils, wildlife, etc., which bear on how and where land may be developed.

**Product:** Master Plan chapter supplemented by maps in GIS format on the following topic areas:

- Vegetation
- Topography and wetlands
- Surficial geology
- Water resources

## **2.2 Open Space and Recreation**

We will review and incorporate relevant portions of Acton's Open Space and Recreation Plan. We will look at conditions for this plan beyond its five-year time horizon, in relation to other topics and population and economic projections. Proposals for management of open space land and recreation facilities will be part of the plan. We will reference appropriate material in the existing Open Space and Recreation Plan, including the five-year action plan to meet identified needs for open space preservation, natural resource conservation and recreation facilities and programs.

Specific objectives and priorities for open space and recreation planning will be reviewed and discussed through the overall public participation program, and by discussions with local officials. We will examine the condition and number of recreational fields and prepare recommendation of what facilities will be needed based on projected population trends. In addition to the Assabet River and Bruce Freeman Rail Trails, we will identify areas where possible trails could be created or extended or linked to regional trails. Acton is fortunate to have good regional connections and an active regional greenways/bikeways group.

**Product:** Master Plan chapter supplemented by an open space and recreation map in GIS format. As noted, it will be based in large part on the newly prepared Open Space and Recreation Plan.

### **2.3 Cultural and Historical Resources**

We will work closely with the Historical Commission, Historic District Commission and Bylaw Committee, and Acton-Boxborough Cultural Council in identifying historic and cultural resources and strategies for protecting and enhancing them. These resources include heritage landscapes as well as buildings of architectural and historic significance. We will also consult source material in identifying cultural resources. We will identify the means to enhance and extend cultural resources. Key steps in analyzing historic resources are:

- Research and write a summary of the history of Acton (for the plan introduction and historic/cultural resource section).
- Review the historic/cultural resource preservation efforts taken by the town in the past (as establishing what has been done). Include in this a review of the town's inventory of historic resources and archaeological resources.
- Review town rules, regulations, and policies that affect preservation efforts.
- Include historic/cultural resource component in the public participation phase of the project.
- Review best practices to integrate historic resources in today's community life and to do so in a manner that balances the need to preserve historic resources and character with the flexibility to change and grow and maintain community vitality.
- Based on reviews and public input, prepare implementation steps for preserving the town's historic and cultural resources. Place the steps in order of priority.

**Product:** Master Plan chapter supplemented by historic and cultural resources map in GIS format.

### **2.4 Housing and Population Density**

A considerable amount of work has been done on housing in the 2004 Community Development Plan, (titled "To Live in Acton") contributing to a state-approved Housing Production Plan for Acton (2005). We will update housing information, where available, using recent population estimates, building permit data and other sources. We will analyze needs, trends, patterns, density and zoning provisions associated with residential housing development.

Using both the 2000 Census of Housing and information from the above documents as a database for housing in Acton, we will update, document and analyze existing conditions. (Note: 2010 Census data are not expected to be available in time for use in this Master Plan update. We will use Census Bureau estimates of population and housing items updated since 2000.)

Building permit data and Census Bureau, MAPC and MISER (Massachusetts Institute for Social and Economic Research at the Donohue Center at the University of Massachusetts) updates of population and households will be used in preparing estimates of housing needs. We will forecast population by age groups to the year 2030. Using this data we will do a life cycle analysis using the categories pre-school children (0-5 years of age), school-age children (6-19 years of age), young adults (20-29 years of age), household formation (30- 54 years of age), empty nesters (55-64 years of age), and seniors (65 and over). These are age groups that have specific housing and school needs, which will be related to estimates of the types of housing and size of schools needed.

Affordable housing will be another focus of the housing plan we propose. Working with data on need, as estimated by the Acton Community Housing Corporation, we will be able to recommend location, type and density for affordable housing in Acton. We will identify strategies to aid Acton in obtaining MGL Chapter 40B 10% affordable requirement. We will also provide consideration of strategies for satisfying 760 CMR 31.07(1) (I), Planned Production requirements.

The assessment will include both relevant statistics and a narrative analysis regarding characteristics of the occupants or consumers of housing in the region. We will provide a narrative and graphic assessment of current and future housing demand considering the following:

- Housing size
- Current and projected population through 2030.
- Number and type of households
- Age composition and distribution
- Income
- Poverty level income
- Low income (up to 50 percent of area median)
- Moderate income (51 to 80 percent of area median)
- Middle Income (81 to 150 percent of area median)
- Upper income
- First time home-buyer income

In addition we will examine and/or update measures of housing demand including:

- Acton's level of subsidized housing included in Chapter 40B.
- The affordability gap between the community-wide median income, incomes of people needing housing, and the income required to purchase and/or rent homes in Acton. Determine what each group in Acton can afford to pay for housing and determine what income levels can presently afford to live in town.
- The number of households on waiting lists for local or nearby town housing authority subsidized units, and whether the number increased/decreased in recent years, also the housing authority's estimate of need in the next 10 years.
- Housing need as expressed by local and regional businesses based on projected expansion plans.
- Gaps in the continuum of housing (low cost rental, first time homebuyer, market rate, assisted living, etc.).
- Working with data on need, through a participatory process, we will be able to recommend location, type and density for affordable housing in Acton.
- Using data from Banker and Tradesman published by the Warren Group, information on housing foreclosures.

Finally, we will perform a check on progress in the implementation of steps recommended in the 2004 “To Live in Acton” report. That plan recommended a series of steps intended to:

- 1) Modify Acton’s zoning bylaw to require affordable housing benefits in all residential and mixed-use developments, with incentives to provide more affordable units in zoning districts already designated by the town as suitable for higher-density development, and
- 2) Examine, and where appropriate, update the policy criteria contained in the Acton’s Comprehensive Permit Policy for reviewing comprehensive permits and making decisions about the use of locally controlled assets – town-owned property and financial resources – in order to:
  - Guide developers to create housing that meets needs in Acton’s region;
  - Clarify the town’s preferences for residential use types, project scale and locations that developers should consider if they plan to propose a comprehensive permit in Acton;
  - Encourage the town to concentrate its own resources on housing needs that most likely will not be met by conventional or comprehensive permit developers; and
  - Adopt organizational and capacity-building improvements to align the objectives and actions of town boards and committees that have a role to play in creating affordable housing.

**Product:** Master Plan chapter supplemented by maps in GIS format on the following topic areas:

- Inventory of housing
- Median household income
- Population density
- Future housing

## **2.5 Economic Development**

A considerable amount of work was done on economic development in the 1998 Master Plan Update and the “To Live in Acton” report. These materials cover the following topics:

- Development of an economic statistical profile
- Establishing economic development goals
- Assessment of economic development objectives in relation to growth suitability maps
- Identification and evaluation of alternative economic development strategies
- Establishment of an economic development implementation strategy and location map

Our work on economic development will include identification and analysis of key regional economic trends that will affect future levels of employment, taxation and development in the region. There will be an emphasis in the work on regional conditions because these are what determine the kinds of businesses that can be expected to grow in Acton and be attracted to locate in town. We will consult with the Acton Economic Development Committee and the Acton Economic Development Industrial Committee to use any information they have on current economic conditions, and the goals they have for economic development in town.

Based on this analysis, we will identify strengths and weaknesses in the composition of Acton's businesses, and outline programs to enhance the economic base of the community. In particular, we will evaluate existing conditions in Acton's commercially zoned areas, including regulations that encourage or discourage enhanced use of these areas. We will also examine how future enhancements at Kelly's Corner, the villages, and in the Great Road area, building on recent improvements, can encourage economic development in these places. Our staff has done several town commercial studies and understands the conditions needed for business expansion and revitalization.

A current economic profile will be updated that included relevant statistical information and a narrative analysis. This profile will include:

- Location and number of businesses, employers, and employees in Acton;
- Types of businesses should be classified by industry, using NAIC (North American Industry Classification, using data from both the Mass. Department of Labor and Workforce Development and Claritas, a private data source). We used both data sources in determining addresses and for other purposes in the Business Survey done as part of Phase I;
- Workforce development programs serving the community, and their compatibility with business employment needs in the community/region; and
- Current and projected job growth, including work force characteristics, age composition, distribution, average wage, and commuter routes.

A future economic profile will include relevant statistics and a narrative analysis describing Acton's economic development potential. The profile will be used to help to determine economic goals by outlining the constraints and possibilities of the local economy, as noted especially related to regional conditions.

Identification of key economic trends that will affect future levels of employment, taxation and development will be a major focus of our economic development analysis. Based on existing and past data we will identify strengths and weaknesses in the composition of local business, and outline programs to enhance the economic base of the community. We will interpret the results of the above economic analysis in terms of future commercial and employment space needs in Acton. This work will be integrated with land use planning in terms of recommending the appropriateness of various types of commercial and industrial development based on the physical, employment, fiscal and other characteristics of the town. Our analysis will include the suitability of existing non-residentially zoned areas for future economic development based on soils and other natural features, access, and potential impact on adjacent residential areas. As mentioned we will also examine the zoning provisions for development in commercial and industrial districts with respect to their encouragement of desirable business growth.

Finally, we will perform a check on progress in the implementation of steps recommended in the Economic Development section of the 2004 "To Live in Acton" report. That report recommended a series of steps under the broad categories of:

- Making zoning changes to encourage a diverse economic base, enhance the investment worth and taxable value of commercial and industrial land, and encourage higher-density housing in and adjacent to commercial areas;
- Continuing efforts by the town to implement economic development actions in the 1998 Acton Master Plan;
- Making modest but consistent public realm investments in the Village Districts;
- Creating incentives to encourage micro-businesses and small, start-up companies that are compatible with Acton’s vision of itself; and
- Adopting legislative, organizational and capacity-building measures to strengthen the Acton Economic Development and Industrial Corporation’s role in community economic development.

**Product:** Master Plan chapter supplemented by an economic development implementation map in GIS format.

## 2.6 *Transportation*

During Phase 1, the discussion around transportation focused on alternative ways to travel around Acton. Participants in the visioning process imagined a more walkable and bikeable environment as well as one served by a bus or shuttle system. While the role of the automobile was acknowledged, there was general consensus that sustainable alternatives were desirable and needed. At the same time, growth in traffic resulting from through travel, local and regional development impacts, and other vehicular activity was expressed as a continuing concern.

Because transportation issues are regularly discussed and documented, a traditional Master Plan transportation element would not serve the community well. The Collaborative will base its transportation element on work already documented in prior reports such as traffic studies and environmental impact reports (EIRs), planning documents compiled by MAPC, and in consultation with town staff and the Transportation Advisory Committee. We will also document regional transportation issues and projects that affect transportation for Acton’s residents and businesses, e.g., the status of the Concord Rotary reconstruction, regional initiatives in public transportation, and regional bike path projects such as the Bruce Freeman Trail.

Particular emphasis will be given to identifying opportunities to improve conditions for walking and bicycling through roadway and sidewalk construction. We will review those components of the Capital Improvements budget that relate to roads and sidewalks to determine the ways that funds are being expended. For example, are sidewalk projects connecting discontinuous walking routes? Are road projects incorporating bicycle accommodation? Is funding adequate?

Another component of the transportation element is to look into car sharing and ride sharing programs such as ZipCar and GoLoco, both of which were started by Robin Chase of Cambridge. Planners will investigate the viability of such services in Acton and describe steps to broaden opportunities to travel without owning your own vehicle.

The Town hired Nelson/Nygaard to assist with the preparation of an application for Federal funds to operate a shuttle service to increase access to the South Acton Commuter Rail station

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and to provide other transportation in the Town. We will incorporate the results of this effort into the document.

**Product:** Master Plan chapter supplemented by GIS-based and other maps and tables.

## **2.7 Infrastructure, Public Facilities, and Services**

Like all Massachusetts municipalities, Acton is facing rapidly rising costs in several areas, including employee health coverage, special education services, and utilities. In times of cost surges, it is particularly important to ensure that fiscal policies and strategies result in the most prudent spending decisions. For example, short-term budget cuts in areas such as maintenance, often needed to balance the books, can result in the deterioration of assets to the point where repairs are no longer an option but full replacement is needed. In other words, by not spending a modest amount today, a town can end up spending far more in the future.

The RFP calls for consideration of school and town facilities and services, an assessment of public infrastructure, staffing requirements, funding, potential efficiencies, and ways to improve citizen interaction. These questions are quite complex and would merit a separate study of comparable scope to the overall Master Plan.

Therefore, to provide a meaningful set of potential recommendations for this element, the Planners Team will utilize the model of study undertaken by the Brookline Override Study Committee (OSC), which relied upon available reports from municipal staff, comparable data from peer communities, and interviews with town and school administration officials and others. The goal of this task is to lay the groundwork for future efforts to advance the discussion on how to set fiscal priorities and create more cost-effective school and municipal services and facilities.

We will work with the Town to identify a group of peer communities that have socioeconomic characteristics similar to Acton although they may differ in population; Concord, Weston, and Wellesley might be considered. We will then compare municipal staffing and expenditures in Acton and the peer communities and identify similarities and differences. We will also prepare a trend analysis in department budgets over the past ten years and look at the share of the municipal budget going to each service.

We will also prepare a list of Acton's municipal facilities including buildings, recreational facilities, and infrastructure, and identify their age and history of capital expenditures. Facility and infrastructure condition and problems and projected future needs will be identified through interviews with Town staff and any available studies.

All available reports will be consulted, particularly those containing recent infrastructure assessments and recommendations. We will investigate potential technological solutions that would improve internal and external communications and determine what peer communities are doing in this area. We will consult with the Massachusetts Municipal Association to learn about what peer communities are doing. The goal of this inventory and analysis will be to identify areas where Acton spends either more or less than peer communities, areas that may need greater staffing or capital investment, and opportunities for improving services. We will also examine the Phase 1 survey results, particularly responses to open-ended questions that have relevance to

satisfaction with particular services and facilities. Additionally, we will identify a) opportunities for regional cooperation and b) opportunities for sharing resources across departments, e.g. between the school department and the town.

The Planners Team will document the results of interviews and conversations with notes to be provided to the Town.

Following the identification of opportunities and challenges in Task 3, potential improvements to infrastructure, buildings, and other facilities will be identified in Task 4 and subjected to a conceptual cost analysis in the context of the Town's capital spending budget. Similarly, potential service improvements will be subjected to conceptual cost analysis. In both facilities and services, recommendations from other master plan elements will be incorporated in the analysis, e.g., need for staffing in the economic development area or need for recreational improvements at Town parks. Given that some infrastructure issues are beyond the scope of a planning study, e.g., infiltration/inflow to municipal sewers, some of the recommendations may be for specific engineering studies that are advisable to conduct after the master plan is complete.

**Product:** Master Plan report chapter containing figures, tables, and a GIS map of existing and proposed public facilities.

## 2.8 Land Use

Existing land use data for Acton, available from the Mass GIS, is in our data files now, ready for updating and editing. We will update this GIS data, which were last updated by MassGIS in 1999, with information from the 2008 aerial photography which was performed as part of the development of Acton's new GIS system. This data layer will be on an area-specific basis in which there may be more than one major land use within a parcel of land, rather than on a parcel basis in which, for example, a large forested area might be classified as residential if a single house is present within the parcel. We will supplement this data with available information from the Planning Department and Assessors.

The land use analysis will consist of examining residential densities and determining the compatibility's of adjacent land uses. We will also indicate areas of recent land use change by comparing the aerial photographs with the 1999 MassGIS data. We will also evaluate and use the build-out analysis for Acton, prepared by MAPC, based on existing zoning and land use patterns and environmental constraints. We are very familiar with the techniques and procedures of MAPC build-out analyses. We used and modified their build-outs for Wilmington, Lynnfield and Canton. As part of the opportunities and challenges analysis, special attention will be paid to protecting residential areas from adjacent commercial development.

As part of Tasks 4 and 5 we will propose land use policies and actions to guide in the identification of future growth areas for commercial, industrial and residential activities, and the preparation of recommendations for zoning modification where appropriate. This work will consider both major potential development opportunities such as the Auto Auction site and Kelly's Corner redevelopment, as well as potential incremental changes in the village centers. This work will include conceptual recommendations for zoning amendments (text and/or map) but will not include the detailed drafting of articles for Planning Board review and Town meeting action. We will

examine the town’s review mechanisms and standards for site planning, landscaping, and architectural design, and we will identify potential improvements in development review for consideration in Task 4. We will also identify lands which should be protected from development using information from the inventory and analysis of natural resources, cultural resources and heritage landscapes, and the Acton Open Space and Recreation Plan.

In Task 5, we will prepare recommendations for land use, zoning, and design review, based on the information produced up to this point. We will specifically include environmental factors in our recommendations, using the natural resources inventory that will be available at this point. Land use recommendations will be based on considerations of distribution, access, location, density and intensity of use. In addition to the input received at the public workshops and our consultation meetings with the Planning Board, Conservation Commission, Design Review Board, and other boards and committees, we will also consider the standard planning norms for development of the type indicated by the goals and policies for Acton in evaluating land use recommendations. Such standards include norms for setting aside open space, for roads, for maintaining the utility of public facilities and infrastructure, and for achieving the mix and density of residential and commercial and industrial areas indicated as preferred by residents and businesses in Acton in the Phase 1 surveys and in public meetings.

**Product:** Master plan chapter supplemented by Existing Land Use and Future Land Use maps in GIS format

## **2.9 Sustainability**

Over 75 percent of Acton residents who responded to the surveys we conducted were interested in sustainability; 79 percent said the town should take action if the costs were reasonable. At the same time, none of the potential ways of achieving sustainability was an overwhelming choice in the surveys and workshops. This is to be expected, because sustainability is a complicated subject and its concepts have been evolving for years and only recently have begun to come into focus as a coherent picture for a town like Acton. Furthermore, sustainability has aspects that involve all of the sections of the master plan.

The simplest definition is perhaps the best: **“sustainability means living in such a way that our children can continue to live as we do.”** This definition encompasses not only protecting environmental systems but also maintaining the town’s character through preservation of open space and historic character while also preserving affordability so that young people continue to live in the community. For example, if social diversity is important to the community, sustainability can also mean maintaining that diversity. And, for reasons that are becoming clear at the global scale, a key aspect of sustainability is the way we use energy in our homes and businesses and in the transportation system.

We propose that sustainability and energy should comprise an additional key section of the Master Plan and we believe that the first public workshop of Phase 2 should include a background briefing on sustainability.

### ***Sustainability Background Briefing***

As noted under Task 1, we believe sustainability should be the first background briefing given in the educational segments that we propose to provide in every workshop. The purpose of this briefing would be two-fold: to provide a basic education in the concepts and context, and to “connect the dots” and have a community discussion about how other parts of the Master Plan  
EXAMPLE.....

#### **Sustainability: What Actonians Need to Know**

##### **A. The Problem**

1. Climate change is happening and human use of fossil fuels is the primary cause.
2. Scientific work is ongoing to reduce uncertainty but there is scientific consensus that the risks are high and the consequences could be catastrophic for the economy and environment of the United States and the world as a whole.
3. At the same time, world energy use is increasing more rapidly than supply and energy prices will therefore continue to increase for some time.
4. Reducing the risks of climate change to reasonable levels requires an ambitious multi-pronged strategy to reduce CO2 emissions. The difference between the current trend and the safer, reduced trend can be broken into several “wedges,” including alternative energy sources, more efficient home heating/cooling, and less energy-intensive transportation choices.
5. Fortunately, at both the municipal level and the household level, the changes needed to address global warming also pay immediate dividends in lower costs for transportation and energy use in homes, businesses, and Town buildings.
6. At the municipal level, inappropriate growth can change Acton’s character and reduce its quality of life by consuming open space, altering the historic fabric, increasing traffic, and raising municipal costs.

##### **B. Potential Responses**

1. Sustainability is the strategy and package of actions aimed at making the future economy, environment, and quality of life at least as rewarding, viable, and happy as today’s.
2. Municipal energy programs that “pay for themselves” can now address both the expense of home heating and cooling, and thereby make a significant contribution to reducing unnecessary CO2 emissions.
3. Local transportation programs can help reduce the cost and CO2 emissions of automobile travel.
4. The pattern and quality of residential and business growth in Acton can make efficient transportation options more viable while enhancing community life and healthy lifestyles for people of all ages, and preserving town character and open space.
5. By pursuing a sustainable strategy crafted specifically for Acton, townspeople can improve their quality of life in both the short- and long-term and at the same time do good for the world environment and future generations.

contribute to sustainability. A key point that the briefing needs to make is that sustainability is not a sacrifice we make for future generations: rather, **sustainability is in the short-term self-interest of nearly everyone in Acton as well as in the long-term interest of the United States and the rest of the world.** A second key point is that the sooner action is taken, local benefits are greater and long-term impacts are lessened. In conducting the sustainability briefing we will emphasize factual information that people may not know and perspectives that may be new to some.

The outline for a sustainability workshop needs to be developed with the input of the staff and Master Plan Steering Committee, but its basic points might be as shown in the shaded box.

We hope and expect that this briefing, and the public information materials developed to support it, will energize Actonians and identify several directions in which the Town can use the Master Plan to achieve greater sustainability and implement a prioritized set of actions to achieve the vision of *Acton: Today. Tomorrow. Together.*

These are not uncharted waters, but Acton will be among the leading edge American communities that are taking action to safeguard their own future and contribute to worldwide efforts to create a better future.

### ***Sustainability Element of the Master Plan***

In the inventory and analysis task, we will prepare an analysis of sustainability issues in Acton. Because of the nature of the sustainability concept, this will largely be a synthesis of the issues in other plan elements relating to the categories of sustainability:

- Environmental – conservation of forest, meadows, wetlands, and farmland, promoting non-automobile transportation and energy conservation, and solid waste recycling
- Cultural – preservation of Town character, including historic buildings and village centers and heritage landscapes
- Socioeconomic – maintenance of social, income, and age diversity through housing, schools, and programs for seniors, and the potential for Acton’s children to remain in the town when they start their own households
- Fiscal – management of the municipal budget in a manner that can be sustained into the future, through the balance between the existing and future tax base and expenditures on facilities and services.

This synthesis of information developed in the other plan elements will be supplemented by addressing carbon emissions, including a rough estimate of carbon emissions from transportation and residential and business space heating. In Task 3, opportunities and challenges related to conserving energy and reducing carbon emissions will be identified. This will be an opportunity, as part of Workshop 2, for the Town to consider whether it wishes to include working to reduce climate change in the actions that follow from the Phase 1 goal of planning and educating for sustainability. If so, a number of actions which further this objective could be included in the list to be evaluated, including measures that are proving to be popular and successful in other

communities to reduce automobile dependency and to provide assistance to homeowners in arranging for energy audits and energy saving home improvements.

In Task 4 potential actions will be developed and evaluated from the point of view of sustainability as well as the other goals and objectives. For example, the carbon equivalent of energy reduction through transportation measures or home weatherizing can be estimated and compared with municipal and resident costs or savings, associated with these actions. Measures such as open space acquisition can be qualitatively evaluated in terms of sustaining town character and preserving habitat. In Tasks 5 and 6 the actions which are favorably evaluated will be prioritized and validated. In Task 7, the sustainability chapter of the Master Plan can provide a theme or “big picture” for the Plan as a whole, highlighting many of the Plan’s recommended actions and showing how they work together to make a sustainable future for Acton.

### **Task 3: Opportunities, Challenges, and Potential Actions**

Based on the inventory and analysis of each planning element, we will prepare a synthesis that identifies opportunities and challenges in each functional area (e.g., housing, economic development, open space preservation, etc.) as well as a map that shows them by geographic area of the Town.) These opportunities and challenges will be related to the preliminary goals and objectives and to the overall sustainability theme. A public workshop will be held to present this synthesis and to brainstorm on potential actions that could be used to meet Acton’s goals.

#### **Products:**

- Memo on Goals, Objectives, Opportunities and Challenges, with map.
- Master Plan chapter

**Meetings:** public workshop presenting Opportunities and Challenges analysis and brainstorming potential actions in response to them,

### **Task 4: Evaluating Potential Actions**

Based both on the information gathered in Task 3 and our team’s knowledge of current planning practice, we will prepare a list of potential actions and their relationship to the town goals and the opportunities and challenges. We will also identify the relationships among the potential actions such as clusters of actions that are mutually supportive (e.g., pedestrian/bicycle connections to village centers and open space) as well as tradeoffs and incompatibilities between actions (e.g., between encouraging development to strengthen a village center and the protection of a development parcel as open space.)

During this task, we will identify needed staffing and volunteer resources and order of magnitude cost for potential actions as well as qualitative outcomes such as encouraging or discouraging development, supporting community interaction, and sustainability.

Based on this first round of analysis and community conversation, we will reduce the list of potential actions and refine the definition and evaluation of each action. Among the actions considered at this stage are specific conceptual changes in zoning and/or subdivision regulations. Although it cannot be foreseen at this time, the final set of potential actions might include

clusters of actions on which there is general agreement and other clusters in which clear alternatives have emerged. In both cases, we will identify costs, tradeoffs, and synergies and evaluate the extent to which each action advances specific community goals. The set of refined actions and their evaluations will be the subject of a public workshop and a workshop for Board and Committee members.

**Products:**

- Long list of potential actions to address goals/objectives and opportunities/constraints
- Plan Conceptual level evaluation of long list items
- Short list of potential actions (including alternatives where appropriate)
- Master Chapter on development of proposed actions

**Meetings:**

- Public Workshop #2 on long list of actions
- Public Workshop #3 on short list of actions

**Task 5: Implementation Plan**

In the area of infrastructure and facilities, generalized cost and revenue sources associated with such improvements will be provided. This capital budgeting analysis process involves prioritizing projects, refining cost estimates, possibly staging projects over several years, and working within foreseeable revenue and funding sources. It is anticipated that the Master Plan will cover a period of 20 years. We will prepare a preliminary six-year Capital Investment Plan containing the town's major capital expenditures that are needed to implement the Master Plan. Which capital expenditures to include will be determined by professional judgment, public comments and an analysis of funds available through local, state and federal sources. It should be noted that our staff participated in the capital budget analysis process in the Towns of Harwich, and Marblehead, MA.

Because a Master Plan is a guide for making decisions about future development, we will recommend a process that outlines and proposes changes and modifications to be made to the Town's regulatory and governance systems, as well as specific budget recommendations for facilities and services. Specific land use decisions on a project-by-project basis need to be guided by a process, and sets of criteria agreed to by all parties with some sort of jurisdiction, e.g., the Planning Board, the Conservation Commission, the Board of Selectmen and the Board of Health. We will recommend a land use decision-making process and sets of criteria for each major type of land use, and will also identify responsibilities of each town board or commission or committee. Special attention will be given to incorporating decision criteria such as phasing or scheduling growth, that relate land use development to the capital budgeting process.

A key part of the implementation plan is the identification of costs and the assignment of priorities. This can be done by arranging the actions in a matrix in which the rows are the actions and the columns are implementation years (including a column for the “indefinite future”). Actions can be moved from column to column based on both synergies among groups of actions, sequences of actions, and total annual costs including the effort by staff and

volunteers needed to implement each action. The outcome will be a prioritized sequence of actions with do-able total monetary and time expenditures and assigned responsibilities for town staff and boards; lowest priority actions may potentially be eliminated or assigned to the indefinite future.

### ***Coordination of the Draft Implementation Plan with Boards, Committees, and Departments***

As noted in the Community Involvement section of this scope of work, we propose to meet at two key points in the schedule with Town boards, committees, and departments. These will be joint meetings of all department heads and joint meetings with representatives of all boards and committees. The round of such meetings associated with the development of the implementation plan will be a key source of input on priorities and costs. It is particularly important that the Planning Board be represented throughout the process by actively participating in the Master Plan Steering Committee, but because of their role in adopting the master plan and recommending zoning actions for Town Meeting consideration, we also recommend a special presentation to the Planning Board at this stage to insure that all recommendations that fall within their purview will be acceptable to them.

### ***Workshop***

We propose to hold Community Workshop #4 on the draft implementation plan. Its purpose is both to review the sequence of community conversations that led to the proposed actions and to prioritize the actions. Although this could be done by simply inviting feedback on a draft list of priorities, we generally prefer to present the actions in an *un*prioritized form and then to use facilitated discussions to identify the priorities of the participants.

### ***Annual Progress Reporting***

We regard the Master Plan as an ongoing tool for decision making, not a static document. Therefore, a final part of the implementation plan will be a recommended process for renewing the Master Plan itself: annual progress reports to the citizens of Acton, including an evaluation of the outcomes of completed actions. This annual reporting process will be designed to minimize staff resources while at the same time providing the basis for refinements, budget requests, and periodic updates.

**Product:** Draft Implementation Plan

**Meetings:**

- A round of joint consultation meetings with Town staff, boards, and committees
- Public Workshop #4 on the Draft Implementation Plan and survey results

### **Task 6: Validating the Vision, Goals, and Action Plan**

The need for validation is critical to implementation, regardless of whether the action is part of the budget that must be recommended by the finance committee or a regulatory change that must be recommended by the Planning Board before Town Meeting makes the final decision. Although vision, goals, and objectives are logically prior to actions, the best way to validate them is to keep in mind that they are provisional and proceed with discussion and evaluation of

potential actions as described in the preceding tasks. In this way, the outcomes that result from particular goals can be seen concretely and clearly, and it will soon become obvious if the provisional goals and objectives need to be refined or changed.

The validation process has two parts: ongoing community conversations at the meetings and workshops (described previously), and survey research. These represent contrasting ways of gauging public opinion, both of which are needed to provide a complete picture: discussions at workshops reflect the opinions of those in attendance but provide a great deal of depth and detail about these views; surveys, on the other hand, provide enough breadth to make inferences about the whole population, but there is a significant limitation to the amount of detail that can go into survey questions.

Using both methods, and providing the citizens with education through background briefings about key master planning subjects, provides the best inference about ultimate support and outcomes in Town Meeting. We will design an opinion survey and analyze survey data to provide statistically significant conclusions, (but it should be kept in mind that, like a presidential poll that has a well defined level of statistical certainty, the opinions of the people who responded may change right up to the voting booth, or the Town Meeting floor.)

### *Survey*

Three surveys were completed in Phase I (resident web/mail-back survey, business survey, and telephone survey). Another survey is proposed in Phase II to confirm the support for specific recommendations in the Master Plan. A web-based survey is proposed; we do not anticipate the need to distribute survey forms by mail, or to make extensive phone calls as we did in the Phase I surveys. We will evaluate all returns for their statistical reliability.

All survey questions will be reviewed in advance with the Master Plan Steering Committee and Town of Acton planning staff, and questions will be revised based on their input. To the maximum extent possible we will use 3 or 5 point scales in asking for responses to questions. Use of these scales enables respondents to more thoughtfully answer questions that inherently have degrees of urgency or scales of priorities. Examples are: 1) “What priority should be given to completing a program of sidewalk and walkway improvements in Acton?” Very high priority, high priority moderate priority, small priority, no priority. 2) “Which areas should be given highest priority in completing sidewalks and walkways?” Town Center, Village Centers, Great Road commercial areas, residential areas, school areas.

We will also ensure that we coordinate with any of Acton’s boards and committees before asking questions in their areas of interest. We did this in the phone survey of Phase I where questions were asked about the Senior Center and possible bus shuttle services.

### **Products:**

- Memo summarizing survey results and input received at public workshops
- Detailed survey results

**Meetings:** see foregoing task descriptions and Community Involvement section, above.

## **Task 7: Final Meetings and Preparation of Final Report Materials**

Based on all foregoing tasks, we will prepare a Draft Comprehensive Community Plan that is readable, concise, well illustrated and graphically attractive. The Draft Plan will include a series of technical appendices which will document the meetings and surveys and the technical information gathering and analysis.

We at Planners Collaborative take pride in creating reports, brochures, and web products that are well designed, well-illustrated, informative, dynamic, and enjoyable to read. The main volume will tell a story, which we envision as an over-arching theme such as sustainability, that is specific to Acton and includes the full range of topics.

The Plan will contain all elements required by state mandate and clearly set forth a practical, prioritized list of actions that will guide decision-making in the next five to ten years. Responsibilities will be well defined. The Plan will include a description of how the recommendations developed and evolved through the community conversations described in the previous tasks. The Plan will include a process for an annual report card on progress as discussed in Task 5.

We will widely publicize the Plan using the website. A final meeting will be held to present the key points of the plan and to get feedback. We will also work with the Master Plan Steering Committee to discuss and resolve all comments on the Draft Plan and incorporate revisions in the Final Plan. At the conclusion of the contract, all files including GIS overlays and documentation of the planning process will be submitted. Further discussion is needed to determine the number of hard copies of the main volume, the executive summary, and the appendices; costs and therefore budget feasibility will depend on the use of color in the report.

### **Products:**

- Draft Comprehensive Community Plan Report in pdf format, including final vision, goals/objectives, chapters on all master plan elements including governance, sustainability, and implementation plan
- Final Comprehensive Community Plan Report in pdf format for viewing and downloading from the website, plus five hard copies for use in Town Hall and libraries.
- An Executive Summary, potentially in poster format; number of copies subject to the printing expense budget.
- Technical appendices incorporating all data, analysis, and meeting documentation

**Meetings:** Final meeting to present the Comprehensive Community Plan