

Update of Bolton's 2006 Master Plan Process and Organization

Background

On October 9th, 2019 the Planning Board appointed a Master Plan Steering Committee (MPSC) consistent with a charter to update Bolton's 2006 Master Plan. In its initial meetings on November 14th and December 19th an outline of a plan to execute the planning process was developed by the MPSC. The process, described below, applies traditional techniques of project management to an effort that is to be executed reliably and expeditiously by volunteers. The approach is based on the basic premise that very few people in Bolton are able to devote large and continuous amounts of time to volunteer efforts, but are willing to selectively devote short periods of time to smaller clearly defined efforts consistent with their expertise and interest. Consequently, the planning process reduces the entire project into a number of focused and relatively short tasks that focus the skills/interests of volunteers, maximizes individual and group work outside of meetings, and avoids volunteer "burnout" by limiting the length of their effort on any single task. The MPSC is responsible for developing the scope of the individual tasks, coordinating among them to assure appropriate communication among them and ultimately writing the Master Plan.

Elements of the Master Planning Methodology

Key elements in the methodology are:

- A work break-down structure which subdivides the scope of the Master Plan into tasks, each focused on a particular topic, most of which can be executed by specific volunteers in a reasonably short duration (6 months or less). Work on a particular topic will be preceded by an information collection task that will assemble an appropriate amount of pertinent information available for analysis of the elements and development of the Master Plan. Based on the work breakdown structure and the priority of tasks, a Gantt chart (schedule) with interdependencies of activities has been developed.
- An approach that assesses development and needs of Bolton on the basis of population rather than time. This reduces the need to accurately predict the rate of development in determining the needs of the Town. Instead, it relates the needs of the Town to the population, which can be adjusted to a calendar as the rate of development changes with the economy. From a practical perspective, it will address the anticipated needs for approximately 15 years based on population projections.
- A population projection methodology that initially focuses on past population trends and recent town and regional population projections, supplemented by new census information, the age distribution within the projections, and the results of a town-wide survey. Assumptions used in recent projections and data from comparable towns will be examined. Housing development trends, needs, and assumptions that could affect future population growth will also be included.
- An organization to provide oversight and coordinate the interaction among the individual tasks and integrate the results into a cohesive and consistent planning document.

The organization includes:

- The MPSC which consists of approximately 11 voting members and 2 non-voting interns from Nashoba Regional High School, the responsibility of which is managing the interaction among the individual activities of the Plan and performing the final integration and editing. The MPSC will also be responsible for communication to the Board of Selectmen (BoS) and

the Planning Board to which it reports, as well as communication and outreach to the Bolton Community as a whole throughout the planning process.

- Master Plan Task Groups (13) consisting typically of 2-5 members each. The responsibility of each task group is to plan and complete one of the individual tasks. Individual Master Plan task group members can work on more than one task, either simultaneously or sequentially. As the plan development proceeds, some task groups may be combined.

The Role of the MPSC

The Steering Committee provides the leadership and coordinating function for the entire effort as well as the communicating with Town boards and the residents.

The responsibilities of the Steering Committee specifically include:

- Developing the overall sequence and scope of individual tasks.
- Soliciting interested and qualified volunteers to form the individual Task Groups.
- Supporting the drafting and approving the individual Task Plans.
- Coordinating the information between the Task Groups.
- Reviewing the interim progress and final products of the Task Groups.
- Supporting the Task Groups with the additional resources required to execute the Task (Computers, software, purchase of information, consultant services, etc.).
- Consolidating the results of the various tasks and drafting the update of the Master Plan.
- Coordinating the interface with the Town, including other Town boards, public hearings and the press.
- Regularly communicating process and progress to the sponsoring town boards, the Board of Selectmen and the Planning Board.

One or more members of the Steering Committee will work closely with each Task Group.

The Role of the Task Groups

The Task Groups are responsible for:

- Developing task descriptions based on the initial scope description.
- Collecting the information required to execute the task if not available from the preceding task.
- Executing the task in accordance with the task description.
- Managing the meeting schedules and issuing meeting notes.
- Organizing and documenting the source of information.
- Preparing the product of the task (report, maps, recommendations, etc.).

The task group members have been and will be actively solicited on a task-by-task basis. However, a task group member's involvement in related tasks will certainly be encouraged in order to promote coordination.

The individual tasks for the development of the Master Plan will be based on task descriptions that have the following attributes:

- Well-defined scope of work.
- Well-defined source of information.
- Adequate number and qualifications of task members.

- Clear product (content and format).
- Accomplishable in 6 months or less.

The individual tasks are scoped and planned in Task Plans (example appended) by the respective task groups as summarized below.

Task Group	Brief Scope
Climate Change	Assess the impact and recommended mitigation of climate change. This will primarily reference and summarize the 2018 Hazard Mitigation Study and the soon-to-be-completed Municipal Vulnerability Plan. It will also use input from Bolton Local and ConComm climate change forums.
Cultural & Historic Resources	Protected cultural resource needs and protection of existing resources.
Economic Development	Projected development and recommended action based on population projections and past surveys e.g. 2011 Economic Development Committee.
Housing	Based on current and projected population age and economic demographics combined with zoning.
Land Use	Based on Assessors' information and recent studies/reports including the 2017 Open Space & Recreation Plan.
Municipal Services & Facilities	Documentation of existing municipal services/facilities and projection of additional/different services/facilities based on current and projected population age and economic demographics.
Open Space & Recreation	Current facilities and projection of additional facilities to accommodate projected population demographics.
Population Demographics & Projections	Collection of existing population demographics and projections for use in most other tasks.
Public Outreach & Communication	Communication with the Town boards and public through survey(s), regular multimedia updates, presentations, charrette(s).
Schools	Assessment of existing Bolton facilities (not including NRHS) and projection of additional, or re-purposing of, facilities to accommodate future school population and curricula.
Survey	Initial multimedia survey to poll the residents' views on several topics for the Master Plan.
Transportation Improvements	Assessment of current transportation (including Rt. 117 corridor) and recommendation for local and regional transportation to accommodate population growth and transportation needs.

Task Group	Brief Scope
Water & Sewer	Assessment and recommendation of sewage issues based on immediate issues with the area along Rt. 117 between Rt. 495 and Harvard Road as well as broader implications throughout Bolton. Assessment and recommendation regarding water issues based on current conditions and projected municipal, residential and commercial development.
Town Finances & Impact on Taxes	Consider the impact of both the projected tax base and the cost of the Master Plan recommendations.

Financial Assessment

One of the most important aspects of the plan will be a realistic financial assessment of the recommendations and priorities reflected in the Plan.

Coordination with Other Bolton Planning Efforts

The Steering Committee will actively solicit the involvement of Town Boards and other ongoing and near-term planning efforts. Integration of these efforts will result in a more balanced and strategic approach to planning. Wherever possible, the Task Groups will make use of information from these groups and studies in order to minimize duplication of effort and use of volunteer resources. Two examples are the 2018 Open Space and Recreation Plan and the 2019 Housing Production Plan.

Public Involvement

Public involvement will be solicited throughout the planning process. Public input and comment in the planning process are extremely important to capture consensus and to assure that there is political will for its execution. Public involvement will include, as a minimum,

- **Survey** - This will be communicated via print and electronic media including the Town website so that as many residents as possible can fill out the survey. It may be necessary to issue a subsequent survey to gather additional specific information which was not included in the original survey or is required as a result of issues which arise in the planning process.
- **Public Presentation of the planning approach** - This is expected in the second quarter of 2020.
- **Charrettes (Public Forums)** involving the general public and including representatives of the key stakeholder groups in the Town, discussing specific subjects or planning matters facing the town. These working meetings were very useful in development of plans for the Town Common.
- **Presentations on interim Task Group results** - These will update town officials and residents on findings or preliminary recommendations for such things as housing needs, school facility needs, community resources, or possible transportation improvements.
- **Public Presentation of Draft Plan**, either at Town Meeting or in a separate well-publicized venue.

- **Written Public Comment Period** prior to publication of the final draft of the Master Plan.

Schedule

The current schedule for the entire development of the updated Master Plan was to be 18 months, ending in mid-2021. However, the completion date is expected to be delayed since the effort depends almost entirely on qualified volunteers, who have limited time available. (In contrast, a number of area towns have spent between \$137,000 and \$235,000 on consultants to research, manage and write their master plans.) Research has also been delayed due to COVID-19.

Conclusion

The Steering Committee believes that the approach outlined above will significantly enhance the ability of Bolton volunteers to develop a balanced and practical update of the Master Plan. However, the most important ingredient to successful execution of a plan this large and complex is good leadership, discipline and just plain hard work. Bolton volunteers are expected to rise to the challenge.

Appendices:

1. Master Plan Steering Committee Charter

The Master Plan Steering Committee is charged with assessing the current 2006 plan and amending the plan as necessary to provide a basis for decision-making regarding the long-term physical development of the municipality. The comprehensive plan shall be internally consistent in its policies, forecasts and standards, and shall include, but not be limited to, the following elements in accordance with M.G.L., Chapter 41 §81D: goals and polices, land use plan, housing, economic development, natural and cultural resources, open space and recreation, services and facilities, transportation, impact to town finances and taxes, and implementation. Members of the committee shall be residents of Bolton with experience in Massachusetts polices/practices, planning, team building, population planning, traffic planning, municipal planning, economic development, land use and zoning, and finances. Members shall also represent special interests including cultural resources, open space and recreation, schools, housing, conservation, business, seniors, new residents, and long-term residents. Eleven (11) members shall be appointed by the Planning Board and shall report directly to the Planning Board and Board of Selectmen.

2. Master Plan Steering Committee

Bob Roemer	Chairman
Brian Boyle	Vice Chairman
Ken Troup	Secretary
Abigail Ayotte	Member *
Mary Ciummo	Member
Panny Gerken	Member
Megan Irvin	Member *
Molly Myers	Member
Cia Ochsenbein	Member
Chris Rogers	Member
Mark Sprague	Member
Ed Sterling	Member
Paul Tesini	Member

* Non-voting

3. Task Plan Template

Bolton Master Plan Task Plan Template

Prior to starting any task, the Task Group should develop a brief task plan to clearly define the purpose, scope, resources, methodology and schedule for the task. The task plan will help to assure that the task can be completed within the schedule and resources available, help to focus the effort during its execution, and clearly define its relationship with the rest of the Master Plan effort. In many (most?) cases the task plan will evolve, but it's important to keep all tasks coordinated by starting with a good draft and distributing significant updates to the SC and other task teams.

Title

Descriptive title consistent with the name in in the overall project plan.

Task Group Members/Resources

SC members and any other people involved in the task.

Objectives

The purpose of the task including how the information is to be used.

Scope

Complete description of the scope of the task and how it relates to the overall Master Plan.

Product

Description of product (consistent with use stated in Objectives).

Information required to perform task (Types & Sources)

This may be omitted for information gathering tasks. (covered by Product and Methodology).

Schedule

Should include the overall duration, number of meetings, etc. The schedule should be consistent with what can be reasonably expected from the personnel involved for the scope defined.

Methodology

How the task will be performed.

Additional resources required

May include resources that are required, but not currently allocated (resident experts, consultants, computers, etc.) It should also include the specific activity/information required of these resources.

Coordination with other tasks

In cases where interface to another task (e.g. schools, housing and population) is important, describe the relationship.