
Organizing for Sterling's Master Plan



Why am I here?

- Barrett Planning Group
- My role:
 - “Phase One” process
 - Help Sterling prepare for a master plan update
 - Facilitated discussion meetings, May-November
 - Community survey
 - “Open house” planning event
 - Guidance for next phase





Expectations


What do you hope to accomplish through this process?

Organizing for Sterling's Master Plan

Master Plan defined

- Process for deciding what to do, and how, when, and where to do it
- Comprehensive analysis of all aspects of community development
- Works to improve the welfare of communities
- Plan for a community's physical evolution
- Long-range (implementation cycles typically run 5-10 years)





Why have a plan?

- Achieve local goals and avoid costly mistakes
- Balance competing priorities
- Clarify priorities
- Establish policy framework for land use regulations
- Inform the public
- Include the public - public participation

A Master Plan helps communities -

Manage	Manage growth and change
Provide	Provide for orderly and predictable development
Protect	Protect environmental resources
Set	Set priorities for developing and maintaining infrastructure and public facilities
Strengthen	Strengthen local identity
Create	Create a framework for future policy decisions
Promote	Promote open, democratic planning
Guide	Guide land owners, developers, and permitting authorities

State Requirements

- Under M.G.L. c. 41, s. 81D, Planning Boards are required to prepare a master plan with the following elements:
 - Goals and Policies
 - Land Use
 - Housing
 - Economic Development
 - Natural & Cultural Resources
 - Open Space & Recreation
 - Services & Facilities
 - Circulation
 - Implementation

Local Additions (Optional)



- Communities often supplement the requirements of M.G.L. c.41, s. 81D by adding elements that focus on specific local policy interests, such as:
 - Villages
 - Smart Growth
 - Energy
 - Education
 - Governance

What's in a Master Plan?

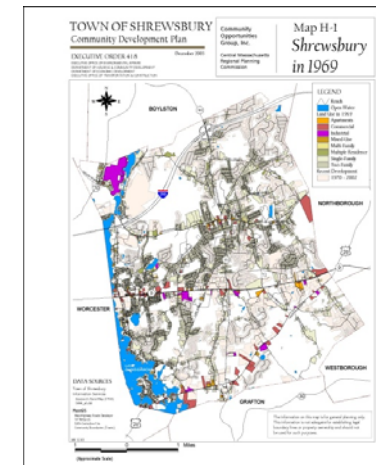
- Community Vision Statement
- Data Analysis
- Existing Conditions
- Trends, Estimates, and Future Projections
- Goals, Policies, and Actions
- Maps

Shrewsbury Master Plan

GUIDE TO IMPLEMENTATION PLAN

PHASE	ACTION	DESCRIPTION	APPLICABLE MASTER PLAN ELEMENTS	PRIMARY RESPONSIBILITY	
Phase I	1-1	Establish Master Plan Implementation Committee	All Elements	Select Board, Planning Board	
	1-2	Review an Open Space Inventory of Design Elements	Land Use, Open Spaces & Recreation	Planning Board	
	1-3	Adopt a Back Lot Development Policy	Land Use, Open Spaces & Recreation	Planning Board	
	1-4	Update and Strengthen the Site Plan Review System	Land Use, Transportation	Planning Board	
	1-5	Adopt the Community Presentation Act	Historic Preservation, Open Spaces, Historic Resources, Parks	Historical Commission, Open Space Commission, Select Board	
	1-6	Study the Site Plan Review Process	Transportation, Community Facilities & Services	Town Board, Select Board, Advisory Committee	
	1-7	Study the potential of mobile home placement in vacant industrial and commercial areas	Historic Preservation, Community Facilities & Services	Historical Commission	
	1-8	Establish criteria to guide the town's response to Chapter 61 or 62 requests, other open space opportunities, and its ability to receive priority open space.	Open Space & Natural Resources, Land Use, Community Facilities & Services	Planning Board, Open Space Commission	
	Phase II	2-1	Develop a master facilities plan to meet functional, aesthetic and cultural needs, and address land management patterns for open-space corridors.	Community Facilities & Services, Historic Resources	Select Board, Advisory Board
		2-2	Adopt regulations to reduce noise in operations and home based employment.	Community Development	Planning Board
2-3		Amend the Zoning By-law and Zoning Map by establishing an East Shrewsbury Village Center and a Westside Board Village Center.	Land Use, Economic Development, Planning, Transportation	Planning Board	
2-4		Adopt Open House Parking Regulations.	Land Use, Transportation	Planning Board	
2-5		Develop an inventory of open space projects consistent with plan.	Land Use & Natural Resources, Land Use	Open Space Commission, Planning Board	
2-6		Appoint a Public Safety Advisory Committee to review design and construction of new public safety.	Community Facilities & Services	Advisory Board	
2-7		Enter a formal contract Gateway District.	Land Use, Open Spaces & Natural Resources	Planning Board	

Implementation Document - 180



Chapter 13: Implementation

LAND USE

Goal LU-1. Institute a comprehensive process for considering proposed zoning changes.

RECOMMENDATIONS & ACTIONS:

- LU-1.1. Develop and publish the criteria that Lincoln's town boards will use to guide their review and evaluation of future proposed zoning changes.
- LU-1.1.1. Conduct an all-boards meeting to calibrate everyone's understanding of the Land Use Review Criteria (Appendix B) and identify any remaining technical issues that need to be resolved.
 - LU-1.1.2. Formally adopt the Land Use Review Criteria following a Planning Board public hearing.
 - LU-1.1.3. Publish the Land Use Review Criteria on the town's website.
 - LU-1.1.4. Meet with key landowners to present the Land Use Review Criteria and explain how they will be used to evaluate proposals for planned development districts in the North and South Lincoln Overlay Districts or zoning changes in other parts of town.
- LU-1.2. Charge the Planning Board with responsibility for coordinating the review process with other town boards, providing timely feedback and guidance to proponents, and providing avenues for the public to participate in the review process.

Goal LU-2. Create a compact, vital, walkable village center in the Lincoln Station area that provides more housing choices near public transportation, goods and services for residents, and opportunities for social interaction.

RECOMMENDATIONS & ACTIONS:

- LU-2.1. Conduct a public planning process that captures resident interests in, as well as concerns about, further development at Lincoln Station.
- LU-2.1.1. Establish a Lincoln Station Planning Committee, appointed by the Planning Board.
 - LU-2.1.2. Determine the Committee's responsibilities and services needed from a consultant.
 - LU-2.1.3. Prepare a budget estimate for consultant services and seek appropriation, or grants if available.
 - LU-2.1.4. Prepare and issue a Request for Proposals, conduct procurement process, and choose a consultant.
 - LU-2.1.5. Develop a public participation program and schedule.
- LU-2.2. Identify potential benefits and drawbacks, if any, arising from compact, mixed-use, and transit-oriented forms of development, and determine acceptable trade-offs.
- LU-2.2.1. Conduct a literature search on transit-oriented development in small suburbs.
 - LU-2.2.2. Conduct focus groups with Lincoln residents and businesses about the opportunities and issues involved with providing for growth in the Lincoln Station area.

How long does it take?

- Nine to 18 months, depending on...
 - Local capacity
 - Community characteristics: size, make-up, complexity of land use pattern
 - Age and relevance of existing master plan
 - Degree of agreement or disagreement about major community issues
 - Planning and zoning track record
 - Perceptions of local government
 - Form of government



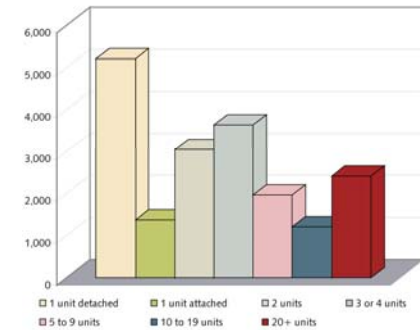
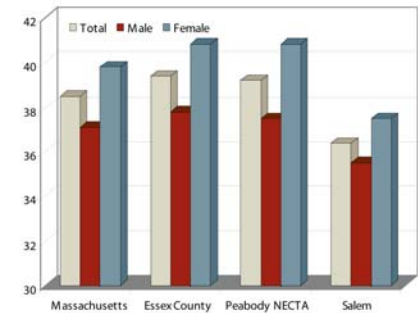
Process

- Where do we want to go?
 - Visioning and goal-setting
 - Interviews with stakeholders and “topic experts”
 - Focus groups
 - Surveys
 - Internet tools

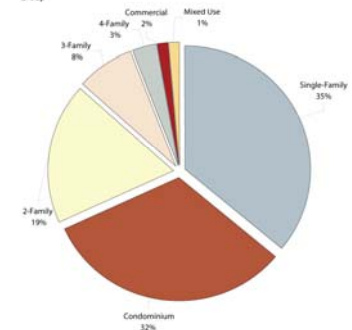
Where are we today?

- Review and synthesis of past plans, studies, reports
- Data Collection
 - Bureau of the Census
 - Regional Planning Agency
 - State agencies
 - Watershed associations
 - Assessor's office
 - Local sources: assessor, library needs analysis, Council on Aging annual reports, school department statistics
 - Town clerk
 - Community organizations

Median Age of Population (2006-2008)
Source: American Community Survey

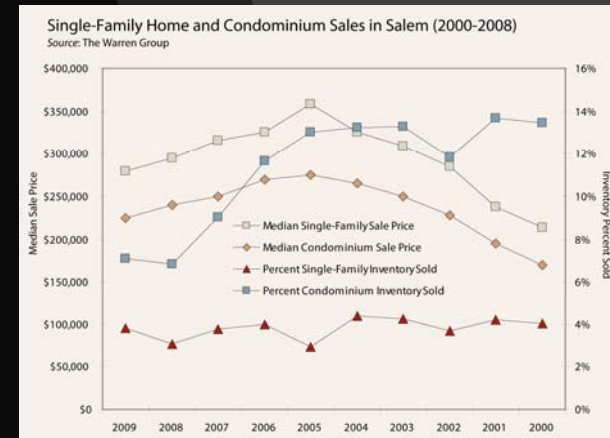
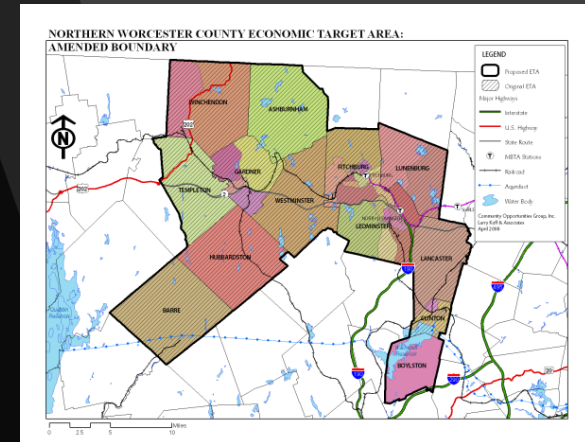


Mortgage Foreclosures by Property Type (2006-2009)
Source: Salem Department of Planning and Community Development, The Warren Group

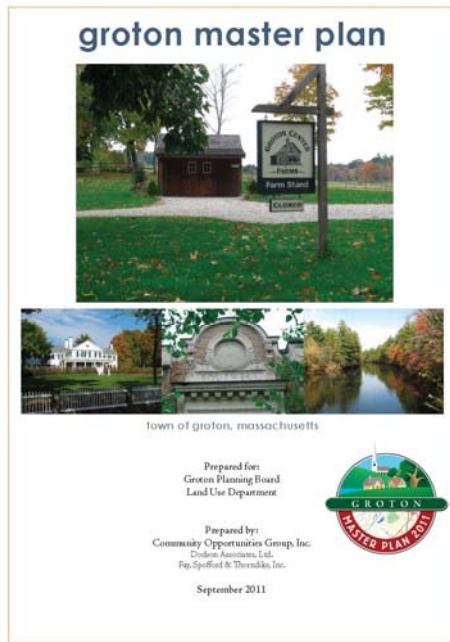


Where are we going?

- Data analysis
 - Trends, estimates, predictions
- What do we need to change?
 - Opportunities and challenges
 - Analysis of options
 - Strategy consensus
- How do we get there?
 - Implementation plan
 - Implementation committee
 - “Early success” actions



Outcomes



- An adopted comprehensive plan with consistency among all elements
- Implementation committee
 - Guides implementation process
 - Sponsors implementation activities
 - Keeps citizens actively engaged in planning and committed to master plan's success
- Often designated to take the lead in evaluating the master plan (usually once a year, could be more often)

Master Plan adoption

- In Massachusetts, master plan adoption requires a majority vote of the Planning Board
 - Does not require adoption by the local legislative body: Town Meeting, Town Council, City Council
 - Still, many communities do present their master plans to the local legislative body for approval or acceptance



Getting Started

- Identify available resources:
 - Funding
 - Staff
 - Volunteers
 - Set priorities
 - Establish work plan
 - Establish timeline



Best Practices

Lessons Learned

Implementation planning starts at the beginning, not at the end, of a master plan process.

Master plan committees need people with different opinions, backgrounds, and interests - and a commitment to work together as a team.

Planning Board needs to remain “present” throughout the process while giving the master plan committee enough space to work things out.



Lessons Learned

- Recommendations need to be realistic, but long-term. Visionary ideas should not be dismissed simply because they are difficult to achieve.
- An implementation plan needs some small but important steps that have broad support and can be accomplished right away.

Engaging the Community





STERLING RECREATION DEPARTMENT SUMMER PROGRAMS 2018



REGISTRATION OPENS APRIL 9th!

SOMETHING FOR EVERYONE

Recreation Committee: Chairperson- Jo Ann Cummings
Mark Hryniewich, Heidi Grady,
Andy Parker, Bonnie Pulda

Recreation Department: "NEW" Butterick Municipal, 1 Park St
Phone: 978-422-3041
E-mail: recreation@sterling-ma.gov

Go where the people are ...



Does participation matter?

Yes!

Successful plans hinge on public participation

Plans fail due to lack of consensus

“Expert-driven” approaches do not work

Local officials and the public must be involved from the beginning



Principles

- Citizens know a lot about their community
- Partnership between planners and the public produce a better plan
- Seek people affected by or interested in a decision
- Active, representative participation through the planning process

Principles

- Give participants information to analyze the impacts of alternative courses of action;
- Let participants know how their input affected decisions
- Build political efficacy and capacity
- Reject token participation methods



Visioning

- Why?
 - Provides focus and direction
 - Generates enthusiasm
 - Encourages creativity
- Key elements
 - Open house or breakout sessions
 - Look for agreement
 - Consolidate/group ideas
 - Text/maps/images

SWOT

- Why?
 - Understand strengths and weaknesses
 - Understand how trends and conditions outside of local control shape or constrain choices
- Key elements
 - Facilitated discussion
 - One topic at a time
 - Everyone speaks; all ideas recognized
 - Ideas prioritized





Group Mapping

- Why? Encourages expression with maps instead of words
- Key elements
 - Memory maps
 - Resource maps
 - Wish-list maps
 - Facilitated process
 - Findings, conclusions, recommendations – not an action plan



Charrette

- Why?
 - Good for site-specific or small-area planning
 - Diffuse confrontation
- Key elements:
 - Vision process
 - Alternative plans, preferred plan
 - Intense, with lots of advance planning

Visual Preference Survey

Question 1

Rate Each Photo of a Place to Walk/Jog/Run

A



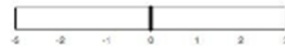
Mean: 3



B



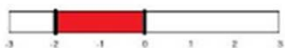
Mean: 0



C



Mean: -2



D



Mean: 1



Summary: Respondents rated Photo A as strongly appealing and indicated that Photo C was unappealing.

- Why?
 - Encourages participation (fun activity)
 - Educates public about design and land use decisions
- Key elements
 - Image slides
 - Participants rank images
 - Discussion process

Field Trips

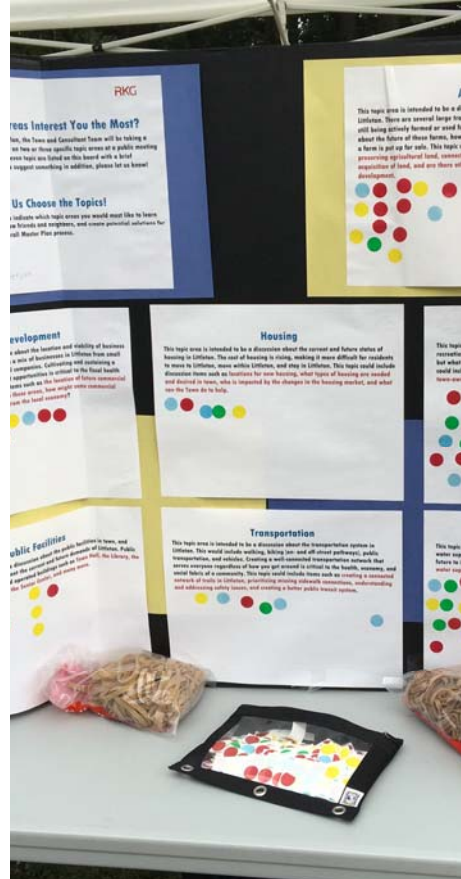
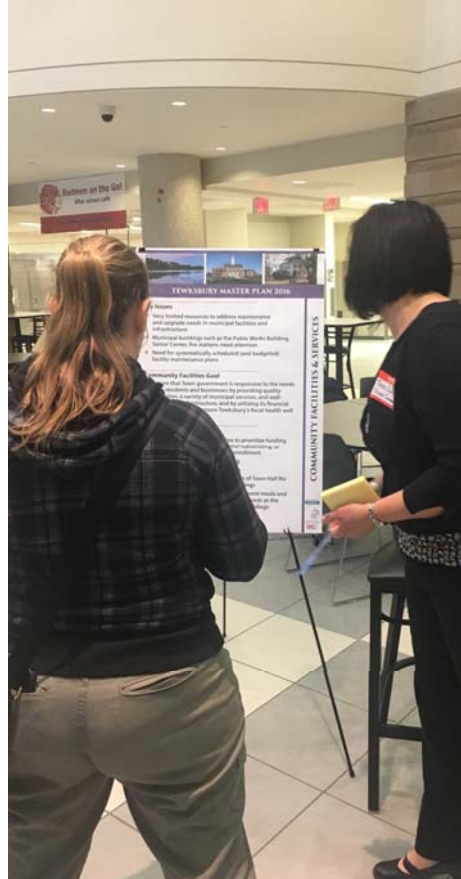
- Why?
 - Sense-of-place activity
 - Serves community-building purposes
 - Public education
- Key elements
 - Physical, educational, and service components
 - Can include citizens in data-gathering procedures



Focus Group



- Why?
 - Reveals how people respond to an issue
 - Good for seeking expert/informed opinions
- Key elements
 - Facilitated discussion, 10-12 people
 - Informal but structured
 - Brief (1-2 hours)



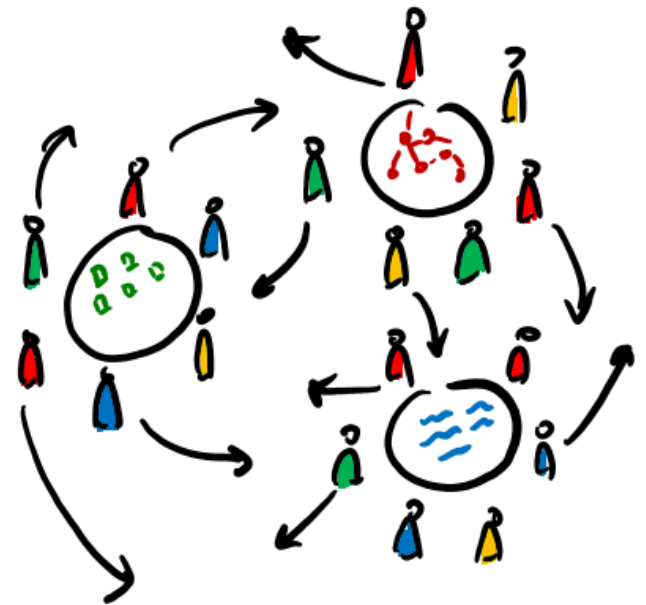
Open House



Best Practices
Best Practices

World Café

- Why?
 - Accommodates large groups efficiently
 - Supports intimate conversations
 - Helps to focus on key issues
- Key elements
 - Large room, café tables for small groups
 - Works in rounds (20 m)
 - Lots of advance organization!





facebook



Participation on the Web

- Why?
 - Alternative method of public participation
 - Supports ongoing planning discussions outside of traditional meeting formats
 - Public information
- Key elements
 - Online discussions
 - Blogs
 - Facebook

Community Survey

- Why?
 - Efficient way to collect local data
 - Can yield substantial amount of information
 - Useful test of public opinion
- Key elements
 - Questionnaire
 - Requires capacity, knowledge of survey design and construction
 - Requires online service (for online surveys)



Guidelines

- Integrate vision, planning, and implementation from the beginning
- Be clear about the purposes, goals, and scope of the project
- Make the process interesting, fun, and diverse



Guidelines



Make	Make it convenient for people to participate
Identify	Identify issues early, and take early action
Remember	Remember the positives
Make	Make information sharing a two-way street
Keep	Keep process open, transparent
Respect	Respect the process
Avoid	Avoid tokenism

Guidelines



Dealing with Skepticism

A plan with concrete outcomes tells residents and business owners that their involvement matters

Combining planning with social events

Encourage naysayers

Invite people

Reach beyond the "usual suspects"

Remember the Place



Best Practices

Remember

Remember sense of place: "Those things that add up to a feeling that a community is a special place, distinct from anywhere else."

Evaluate

Evaluate ideas against place-based goals

Maintain

Maintain communication between groups

Resolve

Resolve conflicting aims without confrontation

Public Trust

1

Open meetings

2

Central clearinghouse for master plan information

3

Timely information

4

Good recordkeeping



Questions?

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