Creating a Master Plan for Your Community

Prepared for:
Citizen Planner Training Collaborative

Ralph Willmer, FAICP
Principal Planner
Metropolitan Area Planning Council
Overview

Master Plan Defined
Purposes of a Master Plan
Legal Requirements
Contents of a Master Plan
Timeline
Key Steps
Outcome
Expense
Getting Started
Planning & Zoning in Massachusetts

Tips and Lessons Learned
What is a Master Plan?

- A future vision and policy guide for the Town
- Plan for a community’s physical evolution
- Comprehensive analysis of all aspects of community development
- Long-range (typically varies from five to 15 years)
- NOT a zoning bylaw or regulation
- Public policy document
Why Plan?

“We usually do our long-range planning at the last minute”
A Master Plan helps communities:

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

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

Communities often supplement the requirements of M.G.L. c. 41, §81D by adding elements that focus on specific local needs or policy interests, such as:

- Villages
- Neighborhoods
- Smart Growth
- Energy
- Climate Action
- Sustainability
- Education
- Governance
- Public Health and Social Services
What’s in a Master Plan?

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

### Strategy

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Responsible Party</th>
<th>Priority</th>
<th>Funding Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incorporate existing reports and plans on fields into the new Open Space</td>
<td>OSC</td>
<td>Short term</td>
<td>CPA, MA Land and Conservation Fund, MA Local Acquisitions for Natural Diversity Program</td>
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<td>and Recreation Plan and prioritize recommendations</td>
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<tr>
<td>Continue to identify, prioritize and preserve open space and recreation</td>
<td>OSC, Rec. Comm., CPC</td>
<td>Ongoing</td>
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<td>resources based upon pre-determined criteria for prioritizing acquisitions</td>
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<tr>
<td>Research and monitor funding opportunities for the creation or preservation of open spaces</td>
<td>OSC</td>
<td>Short term (ongoing)</td>
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<tr>
<td>Consider making additional tax or financing incentives available to existing businesses or as tools for attracting future development</td>
<td>Con. Comm., OSC, TC</td>
<td>Medium term</td>
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<td>Expand public access to open spaces, particularly around the lakes and</td>
<td>Recreation, DPW, Capital, BOS</td>
<td>Medium term (ongoing)</td>
<td>CPA</td>
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<td>along the Quinebaug River</td>
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<tr>
<td>Maintain and enhance existing open spaces and recreational facilities</td>
<td>Rec. Comm., Recreation, BOS</td>
<td>Ongoing (long term development)</td>
<td>CPA, MA Parkland Acquisitions and Renovations for Communities Program</td>
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<td>• Develop a maintenance plan for Town-owned properties and incorporate major improvements into the Town’s larger Capital Improvement Plan</td>
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<td>• Examine whether additional staff or staff hours are needed to oversee open spaces, parks and recreational facilities</td>
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<tr>
<td>Provide recreational opportunities for all ages, and consider developing a community center, football field and multi-use sports field</td>
<td>TC, Con. Comm.</td>
<td>Ongoing</td>
<td>CPA, MA Local Acquisitions for Natural Diversity Program</td>
</tr>
<tr>
<td>Continue developing trails</td>
<td>OSC, Rec. Comm., CPC</td>
<td>Long term</td>
<td>CPA, MA Land and Conservation Fund</td>
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<tr>
<td>Capitalize on small vacant properties to create pocket parks and other open spaces</td>
<td>Recreation, Rec. Comm., OSC</td>
<td>Ongoing</td>
<td></td>
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</tbody>
</table>
Emerging Issues

- Demographic changes
- Social media
- Aging infrastructure
- More urban lifestyle
- Development near transit
- Climate change
- Antiquated zoning
- Shrinking tax base for local governments
- Public health
- Energy
- Building codes and materials
How long does it take?

— Nine months to two years, depending on...

- Local capacity
- Who’s in charge?
- Public process
- 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
- Catalysts for master plan process
- Planning and zoning track record
- Perceptions of local government
- Form of government
- Budget
How does the process work?

- Where do we want to go?
  - Visioning and goal-setting
  - Interviews with stakeholders and “topic experts”
  - Public meetings
  - 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
  - Other local sources, e.g., library needs analysis, Council on Aging annual reports, school department statistics
  - Town clerk
  - Community organizations
— Data analysis
  ➢ Trends, estimates
— Where are we going, given existing policies and trends?
  ➢ 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)
  - Annual review and progress report
  - Sometimes takes the lead in proposing amendments to the plan
Adoption of Master Plan:

- 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.
- Plan is blueprint for zoning, capital improvements, etc.
Hiring a Consultant?

— Not essential

— However, a consultant:

  ➢ Brings experience in community planning, training in technical analysis, and advanced mapping capabilities
  ➢ Brings fresh ideas and awareness of what other communities are doing
  ➢ Provides access to data sources and maps
  ➢ Offers objectivity and political neutrality
  ➢ Provides capacity, efficiency, specialized skills

— Could be a Regional Planning Agency

— Chapter 30B
What Does it Cost?

– Varies considerably
– Depends on:
  ➢ Duration of planning process
  ➢ Design of citizen participation process
  ➢ Survey
  ➢ Geographic area and complexity
  ➢ Form and content of plan
  ➢ Scope of services, e.g., whether planning contract includes zoning implementation

– Communities spend anywhere from $75,000 to $150,000, and sometimes more
Getting Started

- Obtain commitment from the Planning Board and the Board of Selectmen/City Council and Finance Committee

- Identify available resources:
  - Funding
  - Staff
  - Volunteers

- Set priorities

- Establish work plan, including citizen outreach

- Establish timeline
Getting Started

– Who is going to take charge of the process?
  ➢ Planning Board
  ➢ Steering Committee
  
– If Planning Board:
  ➢ Remember you have other responsibilities

– If establishing a Steering Committee:
  ➢ What size? 11 – 15 is ideal
  ➢ Who is appointed and how are they selected?
  ➢ Set up subcommittees?

– How often do you meet?
Getting Started

— Decide on public outreach strategy
  - Public forums
  - Surveys
  - Social media
  - Project website

Overview
- Definition
- Purposes
- Legal
- Contents
- Timeline
- Key Steps
- Outcome
- Expense

Getting Started

Planning & Zoning in Massachusetts

Flyers and Websites

Questionnaires
Reform Efforts

– Act Promoting the Planning and Development of Sustainable Communities
  ➢ Updated plan contents outlined in statute
  ➢ Master plan approval by local legislative body
  ➢ Certification by regional planning agency
  ➢ Incentives to plan in accordance with state’s Sustainable Development Principles
  ➢ “Opt-in” provisions for communities with plans that address state goals

– Uncertain future
– 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.

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

– Test feasibility of implementation program with department heads and boards/committees.

– 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.
For more information, contact:

Ralph Willmer, FAICP  
Principal Planner  
Metropolitan Area Planning Council  
60 Temple Place  
Boston, MA 02111  
617.933.0734  
rwillmer@mapc.org