MEMORANDUM

To: MAPC Council Representatives and Other Local Officials
From: Marc D. Draisen, Executive Director
Subject: Professional Technical and Planning Assistance to MAPC Municipalities
Date: December 7, 2015

I am writing today to invite you to submit a proposal for work to be undertaken by the Metropolitan Area Planning Council (MAPC), for the benefit of your municipality, under the 2016 District Local Technical Assistance program.

I am very pleased to announce that the Governor and Legislature have continued the expanded funding for the District Local Technical Assistance (DLTA) Program for calendar 2016. During 2015, this program enabled MAPC to work with individual communities, or groups of communities, on a total of 30 projects. Through this RFP, we are soliciting ideas for 2016.

Once again, the budget for the DLTA program will be approximately $600,000, including the MAPC match to the state funds. Proposals will be accepted and reviewed on a rolling basis during the months of December and January, with a goal of allocating all funds before February 1, 2016. A municipality may be involved in one community-specific project and also one or more multi-community projects at the same time.

You don’t really need to worry about estimating the costs of a particular proposal. We’ll work with you to figure that out, based on the specific ideas you present and the timeframe for the planning work. Just come up with the best proposal you can, in accordance with the guidelines in this memo, and we will try and fund as many projects as possible.

Note that this year the state has asked us both to encourage communities to enter into Community Compacts with the state, and also to use at least 30% of our DLTA funds to assist communities in implementing state priorities, including the Community Compact Best Practices that are within our expertise. In order to make sure that MAPC complies with this request, we will give preference to projects that are linked to one of the Community Compact Best Practices. Therefore, it will help your community to receive DLTA if you also apply to the Community Compact program, listing a best practice related to your DLTA request.

For more information on Community Compact, and the list of the Best Practices being supported by that program, see: http://www.mass.gov/governor/administration/groups/communitycompactcabinet/

Applying for Assistance
If you wish to apply – either as a single municipality or as part of a group of municipalities – you should submit a two-page-maximum concept scope that satisfies the following requirements:
• Provides a succinct project overview, including (where appropriate) items such as the project status, location, and any previous or related efforts accomplished to date (e.g., plans, reports or studies that have been completed by local staff or consultants).

• Describes the need for the project and the local, regional and state goals that the project will advance. Please refer specifically to the appropriate MetroFuture goals found by going to the MetroFuture web page at mapc.org/metrofuture and following the link to download the “MetroFuture Regional Plan Goals and Objectives,” about halfway down the page.

• Identifies the specific products expected from the project (e.g., draft or adopted bylaw or ordinance, regional inter-municipal agreement, permitting procedures, collective purchasing agreement).

• Describes key project outcomes, or changes/improvements in the community, you expect will be achieved from this process. Examples might be a zoning change, state policy change, adoption of an ordinance at the local level, establishment of a standing committee, etc.

• Explains how local officials, community groups, business and/or institutions will be involved in the planning process, as appropriate, and how the project will involve groups that tend to be under-represented in planning processes (e.g., low-income, linguistic or racial minorities, small businesses, youth, seniors, recent immigrants, etc.).

• Proposes or estimates the project timeline and associated project milestones, if applicable (e.g., must be completed in time for close of fall Town Meeting warrant in August). Note: All projects must be completed by December 31, 2016.

• Describes the municipal commitment to the project. The application should indicate the support of the mayor, city manager, or town administrator to request the grant. The proposal should detail the municipality’s commitment to move ahead with the project in a timely fashion (e.g., will immediately establish a project advisory committee to move the project along). Note that the mayor, city manager, or town administrator will be required to sign the final scope approved for a project to indicate local support for the proposal.

• Designates a single lead community, in the event that this is a multi-municipal proposal. It would be ideal – but not required – to have a clear indication of support from the mayor, city manager or town administrator in each participating municipality. In the case of a multi-community project, the lead municipality’s representative will sign the scope.

• Defines the community’s expected contribution to the project (e.g., XX hours of municipal planner staff time or Planning Board volunteer time to assist in analysis). Municipalities are encouraged, but are not required, to consider a financial contribution to their proposals as a way to extend the scope of projects and demonstrate their commitment to the project.

• Identifies the lead contact from the municipality for the application.

MAPC staff will review the proposal/concept scope and work with applicants to clarify the scope or add any missing information, and then determine the level of effort the project would require and the appropriate allocation of DLTA funds. Projects will be submitted to MAPC’s Executive Director for final approval, and as noted above, all final agreements for approved projects will be signed by the mayor, city manager or town administrator of the lead municipality. Please feel free to contact your
subregional coordinator, any member of the MAPC staff with whom you have worked on a project in the past, or any of the program staff listed below to discuss a potential project:

**Mark Racicot** (land use, housing, economic development): 617-933-0752, mracicot@mapc.org  
**Mark Fine** (municipal services): 617-933-0789, mfine@mapc.org  
**Cammy Peterson** (energy): 617-933-0791, cpeterson@mapc.org  
**Martin Pillsbury** (environment): 617-933-0747, mpillsbury@mapc.org  
**Eric Bourassa** (transportation): 617-933-0740, ebourassa@mapc.org  
**Barry Keppard** (public health): 617-933-0750, bkeppard@mapc.org

Lastly, I would remind you that DLTA is one of two major programs that enable MAPC to provide technical assistance to cities and towns in the region. The other is Planning for MetroFuture Technical Assistance (PMTA), which is funded by municipal assessments. From the perspective of cities and towns, the programs are largely the same. Generally speaking, we are going to be offering these programs in two rounds per year: DLTA in the fall, with decisions in early winter, and PMTA in the spring, with decisions in early summer. DLTA projects will run through the calendar year, whereas PMTA projects will run through the fiscal year. So, if you have a project idea that isn’t quite ready for prime time now, you will have another opportunity in six months!
Q. What is District Local Technical Assistance (DLTA)?

A. Established by Chapter 205 of the Acts of 2006, DLTA enables Regional Planning Agency (RPA) staff to provide technical assistance to communities for “any subject within regional planning expertise.” For more information related to the past projects funded by DLTA, including reports containing the results of the projects, see the MAPC web site at mapc.org/DLTA_Reports. The total amount of funds available under DLTA is expected to be on the order of $600,000 for 2016, and DLTA projects must be finished by December 31, 2016.

Q. What are MAPC’s priorities in its 2015-20 Strategic Plan?

A. MAPC adopted a 5-year strategic plan in October 2014 (for more information, see http://www.mapc.org/sites/default/files/FINAL%20StrategicPlan%202012-2-14-web.pdf). MAPC sees our technical assistance programs as a means to implement not only the very broad goals of the MetroFuture regional plan, but also the more narrowly defined Strategic Priorities of the agency.

MAPC will pay particular attention to project proposals that advance one or more of the following MAPC Strategic Plan Priorities:

- Encourage development and preservation consistent with smart growth principles, focusing on these three elements
  - Expanding the supply of housing that the region needs to grow economically, with an emphasis on multi-family housing, smaller single-family homes, and homes that are affordable to a wide range of incomes
  - Promoting innovative transportation strategies, including congestion mitigation, shared and appropriately-priced parking, streets that work for all users, and transit solutions for both cities and suburbs
  - Encouraging both residential and economic development that is oriented to take advantage of its proximity to existing or planned subway and light rail stops, commuter rail stations, and key bus stops
- Partner with our cities and towns to promote regional collaboration, enhance effectiveness, and increase efficiency
- Play a leading role in helping the region to achieve greater equity
- Help the region reduce greenhouse gas emissions and adapt to the physical, environmental, and social impacts of climate change and natural hazards.

MAPC will entertain and consider funding proposals that meet the broader MetroFuture goals, even if they do not focus on the Strategic Priorities. However, those that advance the Priorities will be given special consideration.
Q. What are the state’s Priority Funding Areas for Technical Assistance Activities?

A. In concert with the Massachusetts Association of Regional Planning Agencies (MARPA), the state has identified the priority uses for DLTA funding. RPAs shall focus efforts to distribute the RPA allocation of DLTA funds between two general categories: 1) “Planning Ahead for Housing” (or to help reach the Statewide Housing Production Goal) or “Planning Ahead for Growth” and 2) Community Compact Activities. The goal of the DLTA effort is to direct these funds to projects/activities that result in change in the municipalities receiving the DLTA services, whether in law, regulation, program management or practice, that serve to further these objectives. At least 30% of the DLTA funding should be used toward these state goals.

Q. What activities are eligible under the category of Supporting the Community Compact?

A. This category provides funding for municipalities to implement Best Practices promoted through the Community Compact Cabinet program, and to work together to achieve savings and/or to improve the quality of service delivery. Examples of this type of activity include:

- Supporting municipalities that are seeking to adopt state best practices under the Community Compact Cabinet program, including those that want to pursue projects of regional nature. The regional planning agency should pursue a strategy intended to assist municipalities with the state’s priority areas for better government that are within the RPA’s realm of expertise. A list of the Community Compact Cabinet Best Practices is attached at the end of this document. More information is available at the web link below: http://www.mass.gov/governor/administration/groups/communitycompactcabinet/

Q. What are examples of projects that are eligible under Planning Ahead for Housing and Planning Ahead for Growth, and Regionalization?

Proposals may include, but are not limited to:

- The development of zoning and other regulations to promote development of mixed-income and affordable multi-family housing in transit-oriented-development locations, employment centers, downtown locations and state endorsed Priority Development Areas, including, but not limited to, Gateway Cities, and including undertaking studies and making recommendations to change regulations to better manage parking to enable appropriate development
- Advancing the production or preservation of housing, especially housing that is affordable to low- or moderate-income households, or mixed-income housing
- The creation of as-of-right zoning districts such as those eligible under the Compact Neighborhoods policy or the Chapter 40R/Smart Growth statute
- The creation of prompt and predictable permitting through an Expedited Permitting Priority Development Site using Chapter 43D for housing, economic development, or mixed-use, or other zoning or regulatory changes to promote expedited processes for developments in smart growth locations
- Encouraging economic development in MetroFuture-consistent growth areas through such methods as local permit streamlining, downtown or town center economic revitalization, or mixed-use development;
- Identifying challenges and solutions in respect to infrastructure requirements that impact the ability to construct multi-family residential projects or to enable economic development in as-of-right zoning districts and parcels
Identifying multi-family residential, economic development, or mixed-use projects subject to the Permit Extension Act (as amended), assessing impediments to such projects, and recommending steps that the Commonwealth and/or the applicable municipality could realistically take to enable those projects to go forward.

Analysis of affordable and market-rate housing needs, to include, for example, preparation of a Housing Production Plan pursuant to 760 CMR 56.00 et. seq., or other housing-related planning projects/ordinance drafting for a single municipality, or similar undertakings that may guide the execution of a compact among several communities for locating affordable and market-rate housing.

Assisting one or several municipalities who must comply with requirements under the new Fair Housing regulation issued by HUD.

Identification, assessment and mapping of Priority Development Areas (PDAs) and Priority Preservation Areas (PPAs) in a single municipality or among neighboring municipalities, including discussion of specific areas for multi-family housing growth.

Encouraging communities to use the Economic Development Self-Assessment Tool (EDSAT) to assess economic development opportunities within communities and/or regions and to develop implementation strategies based on EDSAT recommendations.

Planning for the preservation of key parcels or natural resources, which will improve the quality of life in the affected municipalities in such a way as to encourage growth and development in appropriate, smart growth locations.

Efforts to enhance the resilience of homes, businesses, public infrastructure, and natural amenities in the event of natural disasters or in response to climate change, in such a way as to protect life and property, save public funds, and preserve a strong residential and business sector over the long term.

Developing or updating components of municipal master plans and providing technical assistance that supports the implementation of strategies which are designed to advance well-planned growth and development policies and practices.

Shared services (e.g., regional animal shelters, regional lockups, regional 911 centers, other public safety and emergency response facilities or systems, information technology/data management, school district/regional school district analysis, shared professional and administrative services, agreements to operate shared waste disposal/recycling facilities/programs, regional clean energy services procurements, shared services related to public health, shared services related to fire/EMS services).

Cooperative agreements (e.g., regional analysis of affordable housing needs, compact among communities for locating affordable housing, agreements regarding economic development along boundaries or shared corridors, agreements to facilitate collaboration between local housing authorities).

Collective purchasing to allow for the cost-effective purchase of goods and services by a consortia or group of communities (MAPC currently administers collaborative procurement arrangements for towns and cities to purchase goods and services such as public safety and public works vehicles and public works maintenance services).

Other cost saving measures that could benefit more than one municipality, or which promote cost effectiveness/efficiency within one community that may serve as an example for others.

Q. Is a municipality required to provide a match for DLTA funding?

A. A successful application does not require a local match, and whether or not a match is proposed will not be used in project selection. However, if a proposed project scope exceeds available funding, then MAPC and the project proponent(s) may engage in a strategic discussion about either a) reducing the project scope to meet the limited funding capacity or b) securing a local contribution (or funding from another source) to more fully support the complete scope of the project.
Q. What other additional criteria will MAPC use in determining which projects to fund?

A. In addition to the requirements specific to each funding category, MAPC will also consider the following criteria when prioritizing projects for DLTA or the Planning for MetroFuture funding:

- **MetroFuture Goals**: The project advances multiple MetroFuture goals. (No project will be selected that is inconsistent with MetroFuture goals).
- **Regional Collaboration**: The project will encourage collaboration in the land use field or in municipal service delivery among multiple municipalities. Generally speaking, projects involving multiple municipalities will be prioritized over those affecting only one city or town.
- **Equity**: The project addresses regional equity issues by enhancing the quality of life for low-income households, minorities, people with disabilities or other disadvantaged groups, as identified in MetroFuture and the Commonwealth’s Sustainable Development Principles.
- **Civic Engagement**: The proposal includes an appropriate level of civic engagement based on the details of the project (e.g., a visioning effort would include significant civic engagement and outreach, while a project that is designed to follow up on a previous visioning effort by drafting a bylaw may instead include only meetings with municipal boards, including public hearings).
- **Readiness for Implementation**: The project is likely to result in near-term “changes on the ground” (e.g., new construction, approved zoning changes, inter-municipal collaboration on service delivery). The community has a stated goal and timeline for implementation.
- **Replicability**: The project could be a model or template for use in other municipalities or groups of municipalities.
- **Impact**: The project will, when implemented, have a significant impact on the region, either in itself, or through the potential for replicability throughout other areas of the region.
- **Local Capacity**: The applicant community has demonstrated they have the capacity to adopt and implement smart growth measures or successfully collaborate with neighboring municipalities to share services or conduct joint purchasing.

Q. What is the general and common scale of technical assistance awarded?

A. In the past, projects have ranged from those in which the community needs only a small amount of assistance to achieve the implementation of local regulatory change (which may take less than 50 hours of technical assistance) to larger multi-community projects that require hundreds of hours of community outreach, coordination, research and bylaw/ordinance drafting. Budgets for 2015 ranged from $5,000 to $50,000, although most were closer to the middle of the range. MAPC intends to continue to approve a range of projects. MAPC will assist the communities selected for funding in determining the estimated hours needed to accomplish the project.
Community Compact Best Practices
For more information, see http://www.mass.gov/governor/administration/groups/communitycompactcabinet

EDUCATION Best Practices

Administration and Finance

Best Practice: Funding is assigned to the proper cost centers, costs are allocated appropriately between the municipal government and the school district, and costs and information is shared in a way that facilitates school-based budgeting. There is evidence that municipal and school administration and finance services are shared to realize economies of scale and may include the consolidation or regionalization of district administration. Data reporting is coordinated across all departments to align staffing and student data with financial reporting, and is consistent with DESE guidelines in order to facilitate benchmarking and comparisons to other schools and districts. Required data reports are sent to DESE through the School Interoperability Framework (SIF). Data reporting meets all quality assurance metrics for timeliness and accuracy.

Coordination and Collaboration – Professional Development

Best Practice: There is shared access to training and supports in regard to academic improvement best practices, with other schools in the same district, and with other districts (e.g. curriculum development, lesson plans, professional development, use of data to inform instruction, benchmark program finance, and track outcomes). Educational collaboratives and inter district agreements are utilized to achieve cost efficiencies and improve program offerings.

Coordination and Collaboration – Higher Education

Best Practice: There is evidence of partnership agreements with higher education institutions to improve articulation with college credit as well as to promote college and career readiness.

Coordination and Collaboration - Transitions

Best Practice: Transition supports are provided between early education and K-12 district and charter schools and demonstrate coordinated activities and resources that maximize families’ access to supports promoting successful birth to eight transitions, with a specific focus on Kindergarten transitions.

Coordination and Collaboration – Early Education

Best Practice: There is evidence of partnerships with private providers in the provision of high quality early education and out of school time services to leverage existing resources, avoid duplication of services and enhance and streamline systems for children and families. The community can demonstrate local adoption of a framework to organize, align and integrate community efforts in early education and care, out of school time services, and family engagement.
ENERGY AND ENVIRONMENT Best Practices

Maximizing Energy Efficiency and Renewable Opportunities

**Best Practice:** There are documented and measurable energy use reduction goals; Clean power is generated locally; The municipal fleet is fuel efficient; Investments have been made in energy efficient municipal street lighting; Energy efficiency improvements and renewable thermal heating and cooling upgrades have been made to public facilities (e.g. housing and schools); Energy efficiency and renewable energy upgrades have been made to water/wastewater plants.

Climate Change Mitigation and Adaptation

**Best Practice:** There is plan to reduce greenhouse gas emissions and adapt to climate change; Regulations and incentives discourage new development in at-risk locations, enhance the resilience of existing development, and encourage mixed-use growth and travel by multiple modes to reduce emissions; Critical coastal and inland infrastructure, buildings, and energy facilities are prepared for more frequent and intense storms.

Sustainable Development and Land Protection

**Best Practice:** There is a Master, Open Space and Recreation, or other Plan to guide future land conservation and development; Smart growth consistent zoning has been adopted (e.g. techniques in the MA Smart Growth/Smart Energy Toolkit); Investments in infrastructure and land conservation are consistent with the MA Sustainable Development Principles.

Comprehensive Water Resource Management

**Best Practice:** There is a plan to supply and conserve water, manage stormwater, and treat and reuse wastewater; The MA Water Conservation Standards are being implemented; Municipal regulations promote green infrastructure and the use of low impact development techniques; An Enterprise Fund or other mechanism is in place to fund maintenance and replacement of water infrastructure.

Solid Waste and Site Cleanup

**Best Practice:** There is a documented plan and approach to Brownfield redevelopment; There is a solid waste master plan; Waste management best practices have been adopted (e.g. “pay as you throw”).

Promote Local Agriculture

**Best Practice:** A right to farm by-law or ordinance has been adopted; The community supports access to fresh produce through the creation of farmers markets and/or establishment of urban agriculture (e.g. commercial ventures or community gardens); Farmland is conserved through acquisition and/or regulation; Sustainable forestry is encouraged.
**FINANCIAL MANAGEMENT Best Practices**

**Budget Document**

**Best Practice:** The annual budget is a municipality’s most important annual policy-making document. As such, the budget document details all revenues and expenditures, provides a narrative describing priorities and financial challenges, and otherwise offers clear and transparent communication of community policies to residents and businesses.

**Financial Policies**

**Best Practice:** Sound financial policies provide important structure and consistency around local fiscal policy decisions and are documented and adhered to. This best practice is achieved by evidence of documented fiscal policies including reserve levels, capital financing, and use of Free Cash.

**Long-range Planning/Forecasting**

**Best Practice:** Financial forecasting and long-term planning help communities detect fiscal challenges earlier, develop strategies to address issues that emerge, and provide the context for analyzing multi-year contracts and other financial trends. There is a documented financial planning process and plan that assesses long-term financial implications of current and proposed policies, programs and assumptions.

**Capital Planning**

**Best Practice:** Funding capital needs on a regular basis is critical to maintaining publicly-owned assets and delivering services effectively. The community develops and documents a multi-year capital plan that reflects a community’s needs, is reviewed annually and fits within a financing plan that reflects the community’s ability to pay.

**Review Financial Management Structure**

**Best Practice:** A strong and appropriately structured finance team is critical to both the short- and long-term health of a municipality. Communities striving for this best practice will evaluate the structure and reporting relationships of its finance offices to ensure that they support accountability and a cohesive financial team process. To the extent that gaps are identified, the community develops a written plan for implementation of the desired finance team structure.
HOUSING AND ECONOMIC DEVELOPMENT Best Practices

Preparing for Success

Best Practice: There is a demonstrated ability to partner with the private sector, non-profits, and public sector organizations in order to advance the housing and economic development vision and goals of the community as evidenced by the successful completion of public/private/non-profit project(s).

Housing

Best Practice: There is a documented community-supported housing plan that accounts for changing demographics, including young families, workforce dynamics, and an aging population.

Infrastructure

Best Practice: There is evidence of a community plan and process being followed to identify development sites and to undertake the necessary steps to enhance site readiness by ensuring the appropriate zoning, permitting, and land assembly.

Competitiveness

Best Practice: There is evidence of the continuous use of performance measures for the evaluation of how competitive the community is compared to other communities in terms of attractiveness for commercial development, and housing expansion.

Job Creation and Retention

Best Practice: There is a documented economic development plan which leverages local economic sector strengths, regional assets, encourages innovation and entrepreneurship, and demonstrates collaboration with educational institutions for the development of a workforce plan.
INFORMATION TECHNOLOGY Best Practices

Cyber Security

Best Practice: There is a documented cyber-security strategy, including policies, procedures and controls aligned with an industry standard security framework.

Transparency

Best Practice: There is a documented open data strategy including timelines for making municipal spending and budget information accessible from the city or town website in a machine readable and graphical format.

Business Continuity

Best Practice: There is a written disaster recovery and backup plan for critical municipal systems along with a documented plan to transfer paper documents to an electronic format and securely store backup electronic municipal data in locations geographically separated from the primary source.

Citizen Engagement

Best Practice: There is a documented citizen engagement strategy for deployment of technology solutions, including a public communication strategy and a professional development strategy to ensure that internal resources can effectively engage with users via technology.

Data Standards

Best Practice: There is a documented plan to implement generally accepted data standards in use at the national or regional-level to promote system interoperability, local data analysis and regional data analysis.

REGIONALIZATION/SHARED SERVICES Best Practices

Best Practice: In an era of shrinking budgets, loss of seasoned employees to retirement, and increased need for service improvements, productive partnerships between municipalities make sense for some communities. This best practices encourages regionalization of some services and sharing resources among municipalities. Technical assistance is available to help your community and potential municipal partners determine if regionalizing is the path to take.
TRANSPORTATION AND CITIZENS SAFETY Best Practices

Complete Streets

**Best Practice:** Complete Streets policies and programs provide accommodations for all users and modes, create safer and more livable neighborhoods, and encourage healthy transportation alternatives. The municipality will become certified through MassDOT and demonstrate the regular and routine inclusion of complete streets design elements and infrastructure on locally-funded roads.

Safe Routes to School

**Best Practice:** The community will show evidence of a comprehensive safe routes to school program which includes the prioritization of snow removal around schools and routes to schools as well as snow removal from bus stops, clearly marked crosswalks, safe sidewalks, safe student pick-up/drop-off areas free from congestion. The program will also include student education on pedestrian safety such as taking care in walking past driveways and through a parking lot, using cross walks, and crossing with a crossing guard.

A Safe and Mobile Future for Older Drivers

**Best Practice:** There is a documented plan to address the anticipated increase in older drivers in the years to come. The plan will include a goal for reducing crashes involving older drivers over the next five years, identification of the issues surrounding older driver mobility, including infrastructure improvements, education for older road users and the public with topics to include insurance and liability concerns, and medically impaired drivers, as well as identify and promote transportation options for older adults in the community.

Sharing Best Practices

**Best Practice:** Municipal Public Works Departments and Highway Departments can learn from each other and share best practices about technologies and operating, maintaining and managing the assets and departments for which they are responsible. Participation in the Baystate Roads Program (BSR) is a demonstration of implementing this best practice. The Baystate Roads Program is a federally and state funded program that provides and facilitates the sharing of state of the art planning, design, and operational information for city and town public works managers.

Citizen Safety

**Best Practice:** There are documented community-based programs to increase, pedestrian safety and motorcycle safety, and promote awareness of the use of seatbelts and child seats, the dangers of texting and distracted driving, the dangers of speeding and aggressive driving, and the dangers of driving while impaired. The community will demonstrate
participation in the Commonwealth’s Office of Public Safety and Security’s trainings and conferences as well as the dissemination of public safety information to citizens.

**Timely Traffic Citation Submissions and Public Safety**

**Best Practice:** There are documented standards processes that when applied by police departments will improve the timely submission of Civil Motor Vehicle Infraction (CMVI) traffic citations. Timely submissions of traffic citations increases public safety by keeping dangerous drivers off the roads; allows faster distribution of funds to cities and towns and allows for timely addition of citations to violators driving records.