



Bolton Long Range Planning Committee
663 Main Street
Bolton, Massachusetts 01740

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The Plan-for-the-Plan

Background

Over the last two years the Long Range Planning Committee, a relatively small group of dedicated volunteers, has been working toward development of a comprehensive Long Range Plan for Bolton. Despite their efforts, the progress of the LRPC was significantly delayed by addressing an unprecedented era of development in Bolton, a number of changes in leadership, and a number of near term issues that defocused the longer term effort.

A new approach to developing Bolton's Long Range Plan was approved by the Board of Selectmen as a result of a presentation on 5 September 2001. This approach, dubbed the Plan-for-the-Plan, applies traditional techniques of complex 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 relatively small, clearly defined efforts to which their expertise can be contributed effectively. Consequently, the Plan-for-the-Plan reduces the entire project into a number of short tasks, each to be executed by volunteers who are specifically interested in the task and/or have unique applicable skills. In this way, it focuses 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.

Mission

The mission of the Plan-for-the-Plan is to develop a comprehensive Long Range Plan to guide the growth and development for the foreseeable future. It is to be completed primarily with volunteer resources in approximately 12 to 18 months, generating interim products to address the Town's immediate needs.

Scope

The scope of the Plan-for-the-Plan will be the completion of a comprehensive Long Range Plan for Bolton. It will address the major parameters which affect the guided development of the Town, including the opinions of residents, requirements for water, sewers, municipal facilities, schools, housing, land use/open space, transportation infrastructure, services, and commercial presence as the Town grows. The Plan will include financial modeling to establish priorities and determine the financial implications of the recommendations in the Plan.

Elements of the Plan-for-the-Plan

Key elements of the Plan-for-the-Plan approach are:

- Dividing the overall plan into 11 broad topics (e.g. housing, water/sewer, land use, municipal facilities, schools, etc.), each of which will be considered at various stages of

build-out. The model developed on a build-out basis can be easily superimposed on a calendar for the purpose of financial analysis and planning.

- Developing a work break-down structure which subdivides each topic into smaller tasks that can each be executed by specific volunteers in a reasonably short duration (100 days or less). The tasks for a particular topic will be preceded by an information collection task that will assemble the large amount of pertinent information available for analysis of the elements and development of the plan.
- Using an approach that assesses development and needs of Bolton on the basis of population rather than time. This eliminates 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.
- Using an organizational approach that uses a large number of volunteers on a number of small, somewhat autonomous tasks, addresses the need to coordinate the interface between these tasks, and integrates the results into a cohesive and consistent planning document. The organization includes
 - LRPC Steering Committee consisting of least 5 members, the responsibility of which is managing the interface between the individual activities of the Plan and performing the final integration and editing
 - LRPC Project Task Groups (10 -20) consisting of 1-5 members each. The responsibility of each task group is to complete one of the individual tasks. Individual LRPC task group members could work on more than one task, either simultaneously or sequentially.
- Immediately starting information gathering for the following critical near-term topics:
 - Survey to determine and establish the perspective of Bolton residents
 - Projections of population demographics based on census data and projection models
 - Housing needs based on current and projected population demographics
 - Water/Sewer requirements based on immediate issues with Emerson School and possible other failures and contamination in Bolton
 - Land use based on Assessors' information and the EOEa Buildout Study for Bolton
 - Municipal Facilities and Services based on other comparable but more built-out towns

All of these efforts include collection of comparative data from other similar towns on services, municipal facilities, land use, school facilities, transportation, water/sewer facilities and housing.

Sequence of Activities

The Plan-for-the-Plan will initially focus on the requirements of the Town at its fully "built out" condition. The "built-out" condition will be based on the population predicted by the EOEa Build-Out Study, as modified by comparative data from other towns, the results of the survey, and other factors. The requirements of the Town during the interval from its current condition to the built-out

condition will be based on points of interim population growth between the current population and "build-out".

Each element (subject) of the Plan-for-the-Plan will consist of tasks that include an information-gathering task, followed by tasks addressing phases corresponding to build-out and at least one interim population condition. It is important that the population at build-out be considered first in order to predict the ultimate needs of the town and the land and infrastructure that will be required to support it. The interim phases will form the basis for planning the transition to the build-out condition.

The activities will be executed in sequence as follows (Arabic numerals indicate sequence of execution; consolidation & editing follow completion of all activities.)

Element	Information Collection	Phase I (Now)	Phase II (Interim stage)	Phase III (Build-out)	Consolidation & Editing
1. Survey	1			2	
2. Water Supply	1	3	4	2	5
3. Sewage	1	3	4	2	5
4. Land Use & Open Space	1	3	4	2	5
5. Municipal Facilities	1	3	4	2	5
6. Schools	1	3	4	2	5
7. Housing	1	3	4	2	5
8. Transportation infrastructure	1	3	4	2	5
9. Commercial presence	1	3	4	2	5
10. Services (personnel req'd)	1	3	4	2	5
11. Financial model	1				2

Based on the work breakdown structure and sequence approach above, a Gantt chart (schedule) and sequence diagram of the activities have been developed (drafts attached).

The Role of the Steering Committee

The Steering Committee provides the leadership and coordinating function for the entire effort. Since the Steering Committee, like the Task Groups, consists of volunteers, it is virtually impossible for a single person to provide all of the leadership, communication, planning and supervision required to produce a high quality and timely Long Range Plan, hence the need for a small group. The responsibilities of the Steering Committee 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 Long Range Plan

- Coordinating the Interface with the Town, including other Town boards, public hearings and the press

At least initially, a member 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 will be actively solicited on a task-by-task basis. However, a task group member's involvement in subsequent tasks will certainly be encouraged in order to promote continuity.

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

- Well-defined scope of work.
- Well-defined source of information.
- Adequate task members (number and qualifications).
- Clear product (content & format).
- Accomplishable by the identified volunteers in 100 days or less.

The individual tasks are scoped and planned in Task Plans (annotated template attached).

The Financial Model

One of the most important aspects of the Plan-for-the-Plan will be a realistic financial assessment of the recommendations and priorities ultimately reflected in the Long Range Plan. The financial model will be developed (with available software) as soon as possible so that financial analysis can be performed expeditiously as data becomes available.

Coordination with Other Bolton Planning Efforts

The LRPC Steering Committee will actively solicit the involvement of Town Boards and other ongoing and near-term planning efforts, including the Police Station Building Committee and the Library Building Committee. It is believed that an integration of these efforts will result in a more balanced and strategic approach to Town-wide planning. Wherever possible, the LRPC Task Groups will make use of information from these groups in order to minimize duplication of effort and use of volunteer resources.

Public Involvement

Public involvement will be solicited at least four times 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 mailed in December 2001 with the Town Census and is expected to be returned in January 2002. 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 Plan-for-the Plan** - This is expected in January 2002 as part of a Selectmen's Meeting and will cover the entire project approach.
- **Public Presentation of Draft Long Range Plan** – Expected in late 2002
- **Written Public Comment Period** – Expected in late 2002

Conclusion

It is believed that the approach outlined above will significantly enhance the ability of Bolton volunteers to develop a balanced and practical Long Range Plan which reflects the will of the residents and can be executed in a reasonably expeditious manner. However, the most important ingredient to successful execution of a plan this large and complex is good leadership, discipline and just plain hard work. It is hoped that qualified resident volunteers of the Town will rise to this unique opportunity to take part in planning the future of their community.

Attachments:

1. Long Range Planning Committee Membership – December 2001
2. Description of Current Tasks
3. Task Plan Template (annotated with descriptions of the contents for each section)
4. Gantt Chart of Plan-for-the-Plan
5. Activity Sequence for the Plan-for-the-Plan

Bolton Long Range Planning Committee
Membership – December 2001

Steering Committee:

Robert Roemer – Chairman	779 – 6954	rer@roemer.com
Panny Gerken	779 – 6351	gerken@ultranet.com
Wayne Wetzel	779 – 5363	wdwetzel@juno.com
Jim Bilancieri	779 – 5166	jimb@soluol.com
Russ Karlstad	779 – 5467	rkarlstad@yahoo.com

Task Groups:

1. Survey Task Group

Susan Tripp	779 – 6863	SusanTripp@email.msn.com
Leigh Shanny	779 – 6080	lshanny@mediaone.net
Panny Gerken	779 – 6351	gerken@ultranet.com
Fred Van Bennekom	779 – 9869	Fred@greatbrook.com

2. Population Task Group

Lisa Shaw	779 – 0446	lshaw100@hotmail.com
Marcia Rough	779 – 0144	mrough@msn.com
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3. Housing Task Group

Christy Mayo	779 – 6685	natemayo@thecia.net
Russ Karlstad	779 – 5467	rkarlstad@yahoo.com
Doug Storey	779 – 0302	destorey@mediaone.net
Eileen Griffin-Wright	779 – 6177	griffine@mediaone.net

4. Water & Sewer Task Group

Wayne Wetzel	779 – 5363	wdwetzel@juno.com
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Barry Gerken	779 – 6351	gerken@ultranet.com
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Kevin O'Brien	779 – 5480	kobrien@town.arlington.ma.us

5. Land Task Group

Clyde Wheeler	779 – 6425	cbwheels114@aol.com
Bob Johnson	779 – 2918	robertj@ma.ultranet.com
Bebe Quinlan	779 – 5571	

6. Municipal Facilities Task Group

Martha Fitzgerald	779 – 0369	mdfitz@mediaone.net
Alice Roemer	779 – 6954	mar@roemer.com
Elaine Davis	634 – 1033	celery099@aol.com
Betsy Cussen	779 – 5038	townclerk@town.bolton.ma.us

Currently not assigned:

Jeff Boudreau	779 – 5284	fryeville@hotmail.com
Al Ferry	779 – 6046	zooter@ma.ultranet.com

Description of Current Tasks

Resident Survey:

The initial task is to develop and publish a survey of Town residents' opinion based on questions developed with input from Town Boards, Town Officials and other organizations compiled by survey professionals. Subsequent tasks will compile and analyze the data from the responses.

Population Demographics and Projections

Collect population data from available sources and project population and population demographics for the next 5, 25 and 50 years. Use population demographics as a basis to project school and Town services requirements as well as support estimates of associated facilities.

Housing Task Group

Collect information regarding:

- affordable and senior housing in Bolton
- approaches to affordable housing in other towns
- anticipated requirements for affordable senior housing in Bolton
- research State requirements for affordable housing
- research state & federal programs for affordable housing
- identify needs and potential locations for affordable housing in Bolton

Water & Sewer Data Collection

Collect data and develop information about the current quality and quantity of potable water in the Town with the ultimate objective (subsequent tasks) of determining what preventative and mitigative measures need to be taken in order to assure an adequate water supply to residents. Develop information regarding sewage disposal failure trends in the Town in order to determine (subsequent tasks) what measures must be taken to assure sanitary and non-polluting sewage disposal.

Land Use Task Group

Collect information regarding the current uses of land in Bolton and potential locations for municipal facilities (municipal offices, police facilities, fire stations(s), library facilities, and DPW facilities), senior/affordable housing, commercial facilities, open space, etc.

Collection Information Municipal Facilities, Services and Transportation

Collect information from other towns which are essentially built-out to determine comparative benchmarks for our needs in the future. This information task will be broad in scope (municipal facilities, services, transportation, and schools) and will provide input information to a number of subsequent tasks in several areas.

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 Long Range Plan. The task plan should be approved by the Steering Committee prior to starting its execution. The following are the sections of the task plan and descriptions of the content for each section.

Title

Descriptive title consistent with the Plan-for-the-Plan task title.

Task Group Members/Resources

LRPC members and any other resource people who will contribute to the task.

Objectives

The purpose of the task including how the information is to be used directly in the Long Range Plan or in subsequent activities leading to the Long Range Plan

Scope

Complete description of the scope of the task. The scope of an activity may be clarified by delimiting it with respect to preceding or subsequent activities.

Product

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

Information Required to Perform the Task (Types & Sources)

Specific information required from outside sources or from preceding tasks. This item may be omitted for information gathering tasks, the primary scope of which is identifying information sources and developing data as specified in the "Product" section above.

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

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

Coordination with other tasks

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