



The Unified Plan: Wellesley's Vision for the Future

Wellesley is a thriving, mature suburban community, incorporated in 1881, that owes much of its success over the last century to its commitment to planning. Toward the end of the nineteenth century, as Wellesley became an affluent residential suburb, many attractive planned neighborhoods were created from farms and estates. The town's leaders took care to direct and shape development. In 1912 the town instituted a Town Building Law, which specified the size and location of homes to protect against fire. The town passed a zoning law in 1925 and was a pioneer in developing a planning board, a board of survey, and a billboard bylaw. The community's attention to planning for the future is one of the reasons it has remained appealing and attractive for more than 100 years. As a journalist commented in the 1920s, the reason Wellesley was such a nice place to live was that they "planned it that way."

Wellesley has adopted four comprehensive plans, in 1965, 1981, 1994, and 2007. The 1965 plan, like many plans of that era, took a pro-growth approach to future development. Subsequent plans have sought a more balanced, growth-management approach, including conservation of open space and town character. While once viewed as primarily focused on land use decision making, contemporary comprehensive plans increasingly include a broad range of topics

MASSACHUSETTS STATE REQUIREMENTS FOR COMMUNITY COMPREHENSIVE MASTER PLANS

MGL, Chapter 41, Section 81D requires Massachusetts municipalities to prepare and adopt a master plan including these elements at a minimum:

- Goals and policies statement, based on an interactive public process.
- Land-use plan element, current and proposed distribution of land use.
- Housing element, existing and projected housing needs and objectives.
- Economic development element, for the expansion or stabilization of the local economic base and the promotion of employment opportunities.
- Natural and cultural resources element, with an inventory of the significant natural, cultural, and historic resource areas and strategies for the protection and management of such areas.
- Open space and recreation element, with an inventory of recreational and open space areas and strategies for the management and protection of such areas.
- Services and facilities element to analyze existing and projected needs for public facilities and services.
- Circulation element, with an inventory of existing and proposed circulation and transportation systems.
- Implementation program element, which defines and schedules the specific municipal actions necessary to achieve the objectives of each element of the master or study plan.

A comprehensive master plan is adopted by a planning board vote after a public hearing and can be amended by the planning board after a public hearing. There is no state requirement that zoning or other regulations be consistent with the community's master plan.

and issues that affect the physical development and economic well-being of the community, such as health, sustainability and resilience. A comprehensive plan is both a process and a framework for future decision making. The planning process provides the opportunity for community residents and others to articulate and review their values and goals through public discussion, agree on what they want the town to be like in the future, and identify the key areas where the town must act to preserve enduring character and to seize opportunities to shape change. The framework is a guidance document that sets out a set of strategies, tools, and specific actions to make the plan a reality. Recommendations can include zoning amendments, design and development standards, programs, management plans, neighborhood plans, and similar initiatives.

Why a “Unified Plan?”

In 2015, Wellesley's Town Meeting authorized the creation of a Town Government Study Committee to study the then-current status of town government. One and a half years later the TGSC published its recommendations, including that the Board of Selectmen undertake creation of a strategic plan to articulate a town-wide vision and priorities. The timing coincided with the Planning Board's process to update the 2007-2017 Comprehensive Plan. Recognizing that the processes to gather input, develop a needs assessment, and conduct rigorous analysis would be similar in the two initiatives, and that they should be interrelated in methodology and results, the Board of Selectmen and the Planning Board agreed to create an innovative, consistent, and visionary Unified Plan, which would then serve as one of the Town's principal planning documents.

The Unified Plan is intended to articulate the Wellesley community's core values, establish a vision for the future, set town-wide priorities and goals, and devise implementation strategies needed to achieve them. It is intended to serve as an umbrella framework under which all public bodies will operate and establish work plans and budget priorities moving forward. The Unified Plan includes state-required comprehensive plan elements as well as attention to strategic concepts for town government.

Work on the Unified Plan commenced with the creation of a vision for Wellesley's future. The vision is an opportunity to describe an aspirational and positive view of a shared future for the entire community. The UP thus includes a vision for the future as well as a set of agreed-upon community values that guided the planning process and will also shape the implementation of the plan. The vision and values were developed through an extensive public engagement process and lively discussion by the Unified Plan

Steering Committee (SC), comprising representatives of town boards, commissions, and committees, and citizen members who applied to participate.

The Town of Wellesley has a decentralized form of government, which empowers boards, commissions and many committees (“Public Bodies”) to hire staff and prepare budgets and work plans independently. These budgets are reviewed by both the Advisory (Finance) Committee and the Board of Selectmen during the annual budget process, where the board or departmental budget requests are negotiated within a town-wide process to arrive at and present a balanced budget to Town Meeting.

The Unified Plan will function alongside the Town’s Town-Wide Financial Plan and Five-year Capital Budget Program. A few departments and public entities have developed strategic plans independently. These departmental strategic plans and others to be developed will be aligned with the priorities identified by the Town in the Unified Plan and the two financial documents, and sequenced as appropriate to work within the Town’s personnel and financial resources.

One of the first tasks the Unified Plan Steering Committee undertook was identification of beloved town assets and locations, as well as those that require attention and improvement. The Unified Plan intentionally focuses on the latter; it reviews existing conditions, summarizes findings, identifies challenges, and makes implementation recommendations. The Unified Plan recognizes that all existing Town services are central to the care of residents and

WHAT IS STRATEGIC PLANNING FOR GOVERNMENT?

“Strategic planning is a comprehensive and systematic management tool designed to help organizations assess the current environment, anticipate and respond appropriately to changes in the environment, envision the future, increase effectiveness, develop commitment to the organization’s mission and achieve consensus on strategies and objectives for achieving that mission. Strategic planning is about influencing the future rather than simply preparing or adapting to it. The focus is on aligning organizational resources to bridge the gap between present conditions and the envisioned future. While it is important to balance the vision of community with available resources, the resources available should not inhibit the vision. The organization’s objectives for a strategic plan will help determine how the resources available can be tied to the future goals. An important complement

to the strategic planning process is the preparation of a long-term financial plan, prepared concurrently with the strategic plan. A government should have a financial planning process that assesses the long-term financial implications of current and proposed policies, programs, and assumptions. A financial plan illustrates the likely financial outcomes of particular courses of actions. Strategic planning for public organizations is based on the premise that leaders must be effective strategists if their organizations are to fulfill their missions, meet their mandates, and satisfy their constituents in the years ahead. Effective strategies are needed to cope with changed and changing circumstances, and leaders need to develop a coherent and defensible context for their decisions.

“Best Practice: Establishment of Strategic Plans”
Government Finance Officers Association, www.gfoa.org/establishment-strategic-plans

meeting their needs; however, the plan also focuses on addressing needs and strengthening Town government operations where short-term action plans are most needed. Through the annual budget process, each department, board, commission and committee has the opportunity to refine and present its work plan, request funding for the coming year and propose future capital projects.

As a combination of a comprehensive plan and an approach to a town strategic plan, the Unified Plan includes state-required comprehensive plan elements as well as attention to strategic concepts for town government. In addition, the Wellesley Board of Health received a grant from the Metropolitan Area Planning Commission (MAPC) for MAPC to prepare a Public Health element for the Unified Plan. The Town engaged a consultant team led by Stantec, with the Institute for Excellence in Government and Community Circle as subconsultants.

Wellesley's Vision for the Future

The Unified Plan Vision was created by the Unified Plan Steering Committee and guided by the results of a community visioning forum and comments on a draft vision from precinct meetings and the project website. The visioning process provides an opportunity to describe a desired, positive future of shared destiny for the whole community. The Unified Plan also includes a set of values to guide the planning process and the implementation of the plan. The vision functions as a “constitution” for the plan as a whole.



Wellesley Unified Plan

OUR VOICE • OUR TOWN • OUR FUTURE



***This is a Vision and Values Statement for Wellesley over the next 20 years.** It serves as the “constitution” of the Wellesley Unified Plan, intended to guide the town as it makes decisions about activities, operations, programs, and capital investments in the future. Specific ways to achieve the Vision and implement the Values appear in the goals and strategies of the Unified Plan.*

Our Vision for Wellesley

In 2040...

Wellesley is a town recognized for its welcoming community culture and exemplary town services; commitment to education and life-long learning; a quality of life that enhances the health and social well-being of its residents; respect for the environment and support for sustainability, conservation, and protection of physical and historical assets; and for its dynamic and thriving business community. Wellesley is recognized for its fiscally sound, well-managed, innovative, and accessible town government that has strong citizen participation and a highly-motivated, collaborative and talented professional staff.



Our Values guide the plan and its implementation



Diversity: Establish, implement and support ongoing initiatives to maintain Wellesley as a community that welcomes a diversity of people and households.



Sense of Community: Foster a sense of community and community-building through support for inclusive services and facilities, town-wide events, multi-generational activities, and community gathering places.



Town Character: Establish policies, practices and criteria for the preservation of the character of the town's residential neighborhoods, commercial centers, and open spaces.



Excellence in Service Delivery: Provide a broad array of services to residents and other users of town services; maintain a strong customer service orientation that strives for excellence in every aspect of service delivery.



Education: Support best-in-class public education, library, recreational and senior services.



Healthy Lifestyles: Enhance the health and wellness of residents through public health initiatives, educational, social and recreational opportunities; create the conditions for healthy lifestyles through easy access to healthful food, medical and psychological care, support systems, non-motorized transportation options, and town facilities.



Connectivity of People and Places: Provide safe, accessible, and efficient transportation choices including public transportation, pedestrian and bicycle pathways, to connect people to town destinations and the region.



Conservation and Sustainability: Make resource-efficient choices to conserve energy, water, and materials; improve water and air quality and reduce carbon emissions; develop and implement sustainable practices to adjust to changing environmental conditions.



Town Asset Management: Maintain, protect, preserve, and enhance the Town's physical assets including facilities, infrastructure, parks, open space, and natural resources.



Business-Friendly: Support existing and new businesses in commercial areas that complement and enhance our community, while protecting quality of life and environmental resources.



Collaboration: Leverage resources and expertise of local private businesses and institutions, as well as neighboring towns and regional agencies, to achieve mutual goals.



Best-Practice Implementation: Establish best practices and priority-based resource allocation systems to support town services, infrastructure and capital investments in a fiscally-prudent manner; conduct long-range fiscal/financial planning that includes appropriate metrics for evaluating progress and adjustment to changing financial conditions.

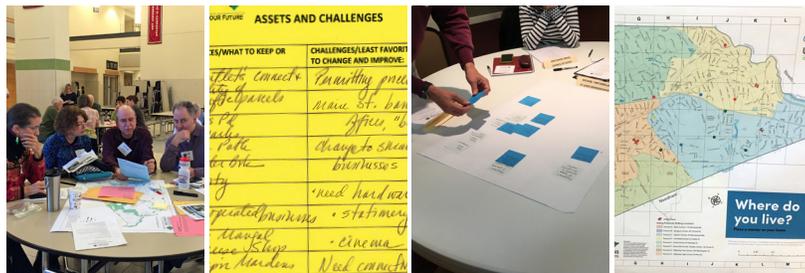


Democratic Government and Citizen Participation: Promote participation and engagement in town governance and decision-making.



Transparency: Facilitate public access to information, making it easy to understand how town government works, how decisions are made and how to get involved; encourage input from and effectively communicate with residents and other stakeholders.

(THE SEQUENCE IN WHICH THE VALUES APPEAR DOES NOT REFLECT A RANKING OF THEIR IMPORTANCE)



Our Voice, Our Town

Beginning in fall 2016, the planning team for the Wellesley Unified Plan interviewed members of the Steering Committee and town department heads; worked with the Steering Committee to identify priorities; developed a draft existing conditions report, *Wellesley Today*; held a town-wide visioning forum; and tallied more than 1,500 responses to community surveys.

VISIONING FORUM

On Saturday, December 10, 2016, **more than 65 Wellesley residents** attended a workshop at Wellesley High School. They came to share



their hopes and aspirations for the future of the town as part of the Wellesley Unified Plan planning process.

Participants were asked to write their **personal vision** for Wellesley, imagining the best, most positive future

for the Town. People responded with a powerful outpouring of ideas, thoughts, challenges, inspirations, and insights.

PRIORITIES

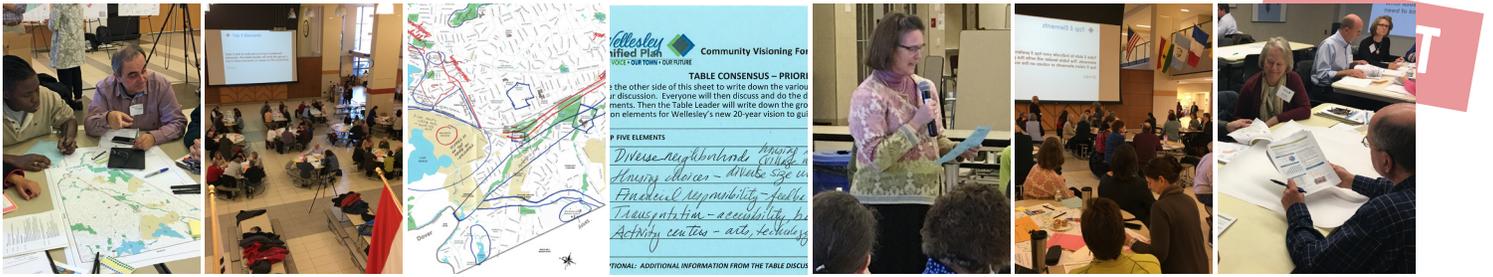
The participants worked in small groups to identify their top five priorities for Wellesley's future. The top categories were:

- **MORE DIVERSITY** (of people, housing, affordability, incomes)
- **OPTIMIZING TOWN GOVERNMENT** (transparency and communications, taxes, inclusion)
- **MOBILITY** (traffic, alternatives to the car)
- **EDUCATION** (maintain quality school system)
- **COMMERCIAL VILLAGES** (more retail diversity, more vibrancy)
- **OPEN SPACE AND SUSTAINABILITY** (preserve open spaces, promote sustainability)

Hopes for Wellesley's future from the personal visions:

More diverse (racial, ethnic), inclusive and welcoming community... dynamic commercial areas... more diverse housing... maintain high standards for education... preserved open space... town government that is managed more efficiently, with continued citizen involvement... increase transparency of town government processes... safety for all who walk and bike... work to decrease noise and light pollution... improve zoning to decrease mansionization... town centers where people can walk to and gather... zero waste community... small business shopping areas... strong neighborhoods—people working together... more connected, more inclusive... better traffic management... good public transportation... increased affordable housing.





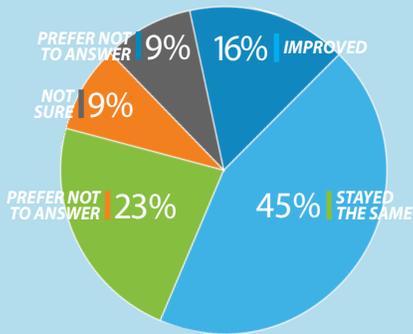
Sources of the Vision and Values

TWO COMMUNITY SURVEYS

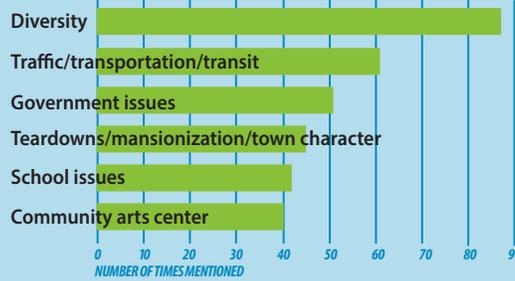
Additional sources of community thinking on elements to be included in Wellesley's Vision and Values emerged from three workshops organized by precinct groupings and two online surveys. 92 participants took part in the three precinct workshops; 464 participants responded to Survey One, and 1,056 participants responded to Survey Two.

FROM SURVEY ONE

Has the quality of life in Wellesley improved, stayed the same, or gotten worse over the last five years?

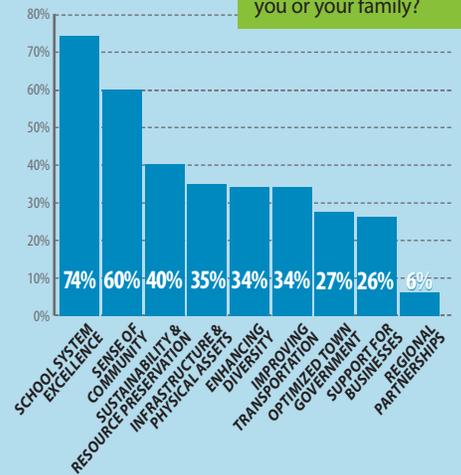


One thing you would change about Wellesley:

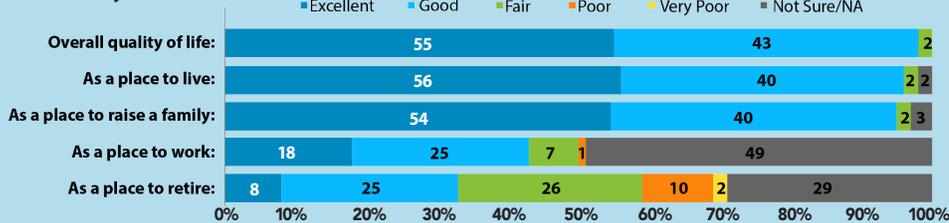


FROM SURVEY TWO

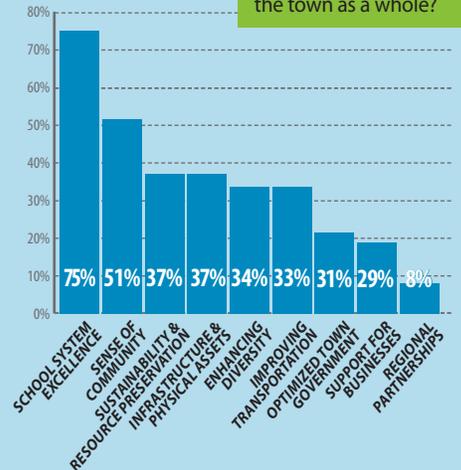
Which of these issues is most important for you or your family?



How would you rate:



Which of these issues is most important for the town as a whole?



How would you rate:

