**Minutes: Master Plan Steering Committee – May 27, 2020 – Virtual Meeting**

Committee Members attending: Janne Corneil, Stacy Lennon. Barbara (Barney) Arnold, Madeleine Blake, Kerry Kissinger, Tanya White, Lynne Lipinsky, Bob Zogg, John Ballantine, Angie Verge.

Absent: Jason Molten, Jessica Nierenberg, Eva Mostoufi

Also in Attendance: George Mansfield, Gretchen Caywood and Carren Panico

Janne Corneil called the meeting to order at 7:00 pm and asked for **Subcommittee Reports**:

Barney Arnold – Town Meeting will be held on June 20 on the Carlisle School Plaza due to Covid 19 concerns.

Madeleine Blake – Lisa Davis Lewis has prepared a draft Municipal Vulnerability Preparedness (MVP) application and forwarded it for review, following which it will be submitted to the State.

Lynne Lipinsky – The FinCom has completed budget reviews with the departments and is meeting tomorrow to put together its final recommendation to the BOS. She added that the Town may decide to do a monthly (1/12) budget until Fall Town Meeting.

Angie Verge – ConsCom meets tomorrow night, with one Agenda item being to begin preparing information for the OS&R Plan update. She noted that the OS&R Committee has not yet met to rank the 10+ acre parcels in Town, but that the ConsCom will proceed with its part of the OS&R Plan update.

Janne explained that two committee members have expressed concern about not putting the MP process on hold. She revisited with the MPSC earlier decision to keep the MP work moving as much as possible, postponing further public input events as necessary, given Covid 19 restrictions. Janne reiterated her opinion that specific tasks, homework and information analysis can proceed without public input, as the MPSC has been doing the past few months, and that she feels it is important to maintain momentum, adapt the public process for the fall and to move forward. She said that she hopes to continue with public outreach in the fall, but that it seems that even then it will need to be at least partially by remote participation. Janne added that the MP will not be a specific set of actions tied to a given point in time, but more of a framework and tool kit for decision making and for incorporating Carlisle's aspirations and values. MPSC members reiterated their agreement that it is valuable and important to move ahead with the MP process during this time.

**Best Practices Worksheet**

Janne gave an overview of the in-process working document prepared by CivicMoxie which presents a first draft of proposed best practices for Carlisle for achieving those goals. Janne asked MPSC members to review and annotate this document with their comments, and forward to her. The annotated document will be provided to CivicMoxie as they further develop the best practices information to share at a future committee meeting.

**Vision, Values and Goals statement**

Stacy facilitated the discussion reviewing parts 1 and 2 of this draft document: 'Vision for Carlisle in 2030' and 'The Vision in Practice – Community Values for a Systems Approach.' These sections were

reviewed in detail for content, level of detail, and to assure that all key aspects of each category will be included.

The Committee reviewed the proposed essential components of Carlisle's Vision for 2030. It was agreed that the components captured Carlisle's vision for the future. Members agreed that going forward Carlisle will want to be open to more shared services with other towns. More specifically, the Committee reviewed the attributes appropriate for Carlisle in 2030. John and Lynne stressed the importance of planning for the longer term. It was noted that currently planning for town projects tends to be done on a year-to-year basis as projects are proposed and advocated – an approach that does not consider any context to an overall plan and is therefore not the best approach for the town.

Concerning a vision for housing in Carlisle, the Committee agreed that currently the housing stock is too homogeneous in Carlisle to support more diverse income levels. Janne said that the town must explore different types of housing in order to remain (or become more) viable to a diverse range of people. Kerry proposed a rewrite of a section of the 2030 vision to more clearly elucidate the vision for Carlisle in terms of housing diversity, maintaining livability of the community for seniors, and attracting new families with school age children. Barney pointed out that in the various 'Kitchen Conversations' held around town for public input, affordable housing was frequently a subject, with residents expressing that they want to attract economic diversity into Carlisle. Janne pointed out that the affordability gap is growing in town.

The Committee discussed the need to create more flexible development options in Carlisle, and that revisions to zoning and land use policies may very well be necessary to provide the amenities and services that residents want and need. Kerry pointed out a few specific examples of certain existing businesses whose owners have expressed the need for more flexibility in what they can do with respect to their business property. When possible expansion of the business district was mentioned, George pointed out that the current non-residential zoning was based on what existed at the site, and not on what is possible, and noted that what exists is very limiting if you are looking at economic development.

Janne and Stacy planned to review this document and correlate it with the MP topics. The Vision, Values and Goals Statement will be discussed further in a future meeting. John offered to contact the Carlisle School and obtain information on their projections for student enrollment.

**Minutes**

The Committee reviewed the draft Minutes from the 5/13/20 meeting. Madeleine moved to approved the Minutes as drafted, Bob seconded the motion, and it was approved unanimously (10-0).

The meeting was adjourned at 8:49 pm

Respectfully Submitted,
Gretchen Caywood

# Carlisle Forward Vision & Goals Statement

**DRAFT_ May 20, 2020**

**Outline:**

1. **Vision** – this is the high-level statement about what kind of town Carlisle aspires to be
2. **Values** – these are the criteria through which we determine our goals and evaluate our progress
3. **Initiatives** - 2-3 key initiatives that involve many plan elements and will require collective agreement among citizens and action in town government (these will be developed in the next phase of the planning)
4. **Drivers**- summary statement by plan element, describing an existing condition/asset or key takeaway that should guide goalsetting
5. **Goals** -specific action-oriented ambitions by plan element
6. **Actions** – specific policy changes, projects, initiatives, etc. that will achieve the goals (these will be developed in the next phase of the planning)

## 1. Vision for Carlisle in 2030

Carlisle seeks to enhance its vibrant sense of community while preserving its rural character as a small New England town with abundant natural and historical resources.

### a. Carlisle's vision includes the following essential components:

- Maintain and strengthen its identity as a rural small town;
- Promote change, as necessary, to assure fiscal sustainability.
- Continue the community's enduring support for quality schools and educational opportunities for all;
- Capitalize on the town's natural and agricultural lands and historic and cultural resources;
- Prioritize spending, maintenance and revitalization of public facilities and infrastructure;
- Strengthen environmental sustainability policy;
- Increase diversity of housing and transportation options;
- Improve or expand available gathering places in the community;
- Provide effective, transparent, and responsive Town decision-making that takes as many factors into account as possible.

### b. Specifically, Carlisle in 2030 will have the following attributes:

- Carlisle is committed to fiscal sustainability and self-reliance, giving priority to spending that yields greater efficiency and provides lasting value. Every expense and procedure is examined based on necessity and efficacy.
- Carlisle's town character is maintained by protecting and nurturing historical and cultural resources, by actively maintaining open space and agricultural land use, and by preserving a vibrant town center.
- Carlisle maintains a first-rate school system (i.e. one that continues to focus on learning for mastery and critical thinking and fosters the physical and mental health of Carlisle's youth)
- Carlisle actively fosters high quality of life for an increasingly diverse community.
- Carlisle's housing mix increasingly attracts families with school-age children and provides seniors with opportunities to downsize or age in place, without compromising the Town's commitments to open space or neighborhood character.

- Carlisle strengthens its healthy community focus by continuing to invest in safe streets and paths and connected access to walking trails and recreation.
- Carlisle takes actions to lower its environmental impact and increase resilience to climate change. This includes protecting natural ecosystems and reducing the town's carbon footprint, as well as preparing residents from the inevitable impacts of climate change.
- Carlisle preserves and maintains town-owned infrastructure and properties and seeks opportunities for adaptive re-use of unused town-owned buildings.
- Carlisle zoning/land use policies create more flexible development options in keeping with community character and values, to provide desired amenities and services to its residents.

## 2. The Vision in Practice – Community Values for a Systems Approach

Community values specific to Carlisle are important to all master planning decisions, regardless of planning approach. These values will be used as criteria to evaluate the outcomes of decision-making to ensure that the recommendations in the master plan and in future implementation actions are aligned with community values. These values include:

a. **Carlisle Character** – The plan defines land use policy that preserves the natural, agricultural, historical and cultural resources of the town, while enabling growth that is consistent with the protection of these resources.
**(Metric**: Land, housing units)

b. **Fiscal Sustainability** – The plan offers a framework for long term financial planning and short term prioritization of costs and investments.
**(Metric**: Cost, revenue, tax rate)

c. **Inclusive Community** -The plan addresses the social and educational needs of Carlisle residents of all ages.
**(Metric**: Social value, cost)

d. **Environmental Stewardship** – The plan promotes conservation of resources, including energy, water, materials, and waste, and mitigates negative effects of climate change. **(Metric**: Social value, cost)
**(Metric**: C02e)

e. **Connectivity** – The plan enhances physical, geographic, digital and social connections across and amongst the community.
**(Metric**: Walkability, Vehicle Miles Traveled (VMT's))

## 3. Key Initiatives (TBD)

## 4. Drivers (Draft prepared for March 4th Meeting)

1. **Demographic Trends**

- Carlisle's population has been aging and the number of families with school age children has been declining over the last decade and is expected to continue trending this way for the next ten years.
- Carlisle's population is generally well educated and wealthy although there are residents that live below the poverty line.
- Carlisle's population lacks diversity.

- School enrolment is at 600 students in 2019, down from 846 in 2004. The school can accommodate up to 900 students.

**2. Economic Base**

- Carlisle's tax base growth is modest and just keeping up with inflation.
- There is very little non-tax local revenue such as user fees compared to other towns.
- There are many home-based and "telecommuting" employment is likely common; services and amenities for home-based workers are scarce.
- Economic opportunities in the region remain strong
- Public private partnerships between public landowners and private operators is a model that has been successful in Carlisle.
- Significant commercial development is unlikely given existing land use patterns and lack of available land.
- There are innovative and entrepreneurial businesses in town that are committed to preserving Carlisle's character.

**3. Land Use & Zoning Policy**

- Town policy and regulations have done an excellent job of preserving the natural landscape and agricultural character of Carlisle.
- Limited land use policy tools, along with market demand for large single-family homes, have resulted in a low density, car-oriented pattern of residential development on available parcels.
- Zoning regulations that promote cluster development and accessory apartments have been adopted in recent years. Few homeowners have taken advantage of many of these tools.
- Few residents know about the Pre-1962 By-right Conversion Bylaw
- Commercial uses are limited to Town Center and a few limited properties along Bedford Road and on South Street
- Many residents would like to see additional local businesses, sensitively woven into the historic character of Town Center.
- Large undeveloped privately and publicly owned parcels should be evaluated for development potential in service of Town land use priorities, including housing, recreation, and open space conservation.
- Conflicting interests and siloed decision making in Town result in contentious land use decisions.

**4. Housing Strategy**

- Carlisle's housing is primarily single-family owner-occupied, with a small number of multi-family and/or rental options.
- There is high housing demand in Carlisle resulting in high house values and high residential taxes.
- Despite relatively high incomes, high housing costs (in addition to high transportation, healthcare, and education costs), create affordability challenges for some Carlisle households.
- Housing production is limited; 100 new houses were built between 2010 and 2019 in Carlisle.
- There is significant interest in the community to diversify Carlisle's housing to provide affordable options for a more diverse community.
- The community is divided over the definition of "affordable" and disagreement on housing policy – 40B or not - remains a major barrier to developing a viable plan for the future.
- There are still large privately-owned parcels of land that could be developed with some amount of affordable housing, although there are few Town-owned parcels close to Town Center.
- High construction and development costs continue to be a challenge.

5. **Public Facilities & Infrastructure**

- The Town budget is a critical concern for many. While the Town has been able to make significant investments into large projects such as two big school projects and a new communications tower, it has deferred maintenance, renovation, upgrades of other Town facilities.
- Residents desire some type of community center that would provide a gathering place for people of all ages to socialize, recreate, and take part in Town-offered programs and activities.
- The Town has not had success in finding viable options for reuse of properties such as the Highland Building and Greenough Barn, and the Cranberry Bog.
- Since homes in Carlisle are sited on minimum two-acre lots, there are no significant water availability or wastewater treatment issues in Town. Increased density would require investigating alternative technologies and changing BOH requirements.
- The growing senior population needs additional services, programs that address affordability, and a stronger sense of community.

6. **Transportation**

- The organic and unplanned evolution of the town's transportation system contributes to a road network that is overburdened and yet constrained by its surroundings and local land use decisions.
- Increased road congestion is likely due to a general increase in regional traffic, changing use patterns, stagnant capacity and lack of a clear infrastructure improvement strategy.
- It will be challenging to address the town's traffic congestion problem as there are no transportation studies of the area readily available from the Town, Commonwealth, or other sources and local data appears to be limited primarily to user anecdotes.
- The extensive and picturesque trail network that links in with conservation land, state and national parklands offers good walking opportunities and is a popular destination for recreational bicyclists in the area, but it is fragmented with few designated bike paths and limited connectivity to the Town Center and to a town-wide network.

7. **Sustainability**

- Carlisle's per-capita greenhouse gas emissions are over 40% higher than the Massachusetts average. Key factors for this likely include that the average Carlisle resident: has 45% more space in their houses; drives 40% more miles; has an annual income that is 115% higher.
- It seems impractical to expect continued progress toward reduction of GHG emissions in the town by relying on solely volunteer efforts.
- As the Mass Green Communities Program has more municipal participants, grant applications will be become more competitive, reducing the Town's chances for obtaining funding for energy/GHG emissions reduction efforts at previous levels.
- The three main ways residents/the Town can reduce GHG emissions are to weatherize homes and buildings, switch from fossil fuels to electricity, and shift to 100% renewable electricity.

8. **Cultural and Historic Resources**

- Residents rely on a varied assortment of organizations, efforts, and spaces within and outside the town to fulfill their cultural and historic preservation needs.
- An estimated 10% of the historic inventory of the town has been lost or is in danger since the 2010 Historic Resources Survey.
- Cultural and historic preservation programming and initiatives would benefit from a more formal system of sharing information and collaboration.

- There is interest in the Carlisle Cultural Council taking on an expanded role in fundraising and programming.

**9. Open Space, Recreation & Natural Resources**

- The total open space for the town is approximately 3,362 acres of land, or 34% of the total land in the town (according to the Carlisle *2013 OS&R Plan)*.
- There is growing demand for recreational space and the Recreation Commission has not finalized a plan for how to meet this need.
- The Town has acquired open space without putting plans in place to maintain, restore, or reuse structures and infrastructure on these lands (i.e. Greenough Barn, Greenough Dam, Cranberry Bog House).
- Some public open space was acquired for Town uses and cannot be considered as protected, including; Conant Land (54 acres); the Banta-Davis Land (39 acres); the Hart Farm Land (65 acres); and the DPW land (18.3 acres).
- Key decisions must be made soon regarding the reuse of the Cranberry Bog.
- The Town needs an integrated comprehensive management plan and maintenance/improvements schedule for all open space and recreation resources.

## 5. Goals (Draft prepared for March 4th Meeting)

**1. Demographic Trends**

- Expand policies and services to meet the needs of a growing senior population.
- Develop land use and housing policy to proactively attract young, more diverse families to Carlisle.
- Proactively manage school enrolment targets through School Choice and METCO programs, as well as housing policy.
- Capitalize on Carlisle's entrepreneurial, philanthropic, and community service culture to address challenges.

**2. Economic Base**

- Increase town revenues through taxes, user fees, growth in population, and economic development, where this aligns with Carlisle's values and character.
- Identify appropriate areas and adopt regulations that allow for business activity that expands town amenities, services and space to support and grow local businesses and entrepreneurship.
- Incentivize programming that creates amenities for and supports home-based workers and entrepreneurs.
- Explore public private partnership models for adaptive reuse of underutilized Town owned facilities.

**3. Land Use & Zoning Policy**

- Analyze effectiveness of zoning regulations to encourage densification of existing properties and new development parcels.
- Update and maintain the Town's Geographical Information System (GIS) database and maps to reflect existing land use and property status accurately.
- Use GIS to document future land use that illustrates a shared master plan vision for Carlisle and serves to inform targeted zoning amendments and incentive programs.
- Identify and encourage potential for selected development that contributes to town amenities and services.

- Ensure that land use decisions consider multiple Town goals, including open space conservation, housing, recreation, and public facility and community needs.

**4. Housing Strategy**

- Increase housing choices for older adults and young families, including housing types and price points.
- Continue to encourage cluster development that allows for a variety of smaller, sustainable housing types on less land that also includes preservation of open space.
- Incentivize accessory apartments and conversion of allowed older single-family homes into two-families to allow for residents to age-in-place.
- Explore other regulatory changes to promote housing diversity and affordability.
- Develop a housing strategy that creates affordability and housing diversity in Carlisle **OR** Develop a Housing Production Plan that allows Carlisle to meet its 40B obligations.

**5. Public Facilities & Infrastructure**

- Create a public facilities master plan that includes all of the Town-owned buildings and properties to guide decision-making for the next 10-15 years.
- Create and support intergenerational community needs by building a new Community Center or finding excess space in existing Town-owned facilities.
- Determine viable uses and/or sale options for underutilized Town-owned structures (i.e., Highland Building, Greenough Barn, Cranberry Bog).
- Investigate new water and wastewater technologies that allow for denser development, while maintaining water quality and natural resource conservation.
- Consider ways that the Town can help residents—especially residents with financial challenges—access funding for repair and replacement of private wells and septic systems.
- Consider strategies that will ensure the long-term operation and viability of the recycling transfer station.

**6. Transportation**

- Identify opportunities to fill important gaps in sidewalk and off-road trail networks that would significantly improve walkability and connectivity in town.
- Investigate methods to improve local street traffic during peak hours, especially related to private vehicle trips.
- Incentivize car share and ride share opportunities more aggressively.
- Encourage increased telecommuting to lower household vehicle miles travelled.
- Support and enhance the Council on Aging's shuttle programs (through COA and Carlisle Transportation Services) for seniors and other non-driving residents.

**7. Sustainability**

- Align Town carbon reduction goals and targets with State policy – Net zero $CO_2$ emissions by 2050.
- Continue to develop and fund programs that assist residents in lowering household $CO_2$ emissions through energy saving home improvements, home energy system replacements, converting to electric vehicles, general decrease in use of private vehicles, decreasing household waste, increasing local food production and purchasing, etc.

- Pursue the Municipal Vulnerability Preparedness program to fund climate resilience planning, hazard mitigation planning, and implementation projects like flood mitigation and extreme weather disaster preparedness.
- Consider land use regulations that help the Town build more compact, walkable, and energy conserving developments.
- Consider strategies that encourage water conservation and improved wastewater management.
- Implement adopted sustainability policies and programs as related to energy use, recycling and waste disposal, land use, infrastructure, and other projects when the opportunities arise.

**8. Cultural and Historic Resources**

- Support Carlisle's diverse offering of cultural activities and community activities
- Create a comprehensive historic resource plan that prioritizes, guides funding and preserves Carlisle's historical assets for conservation, public enjoyment, and educational purposes.
- Explore public private partnership opportunities to adaptively re-use Carlisle's publicly-owned buildings with historic value, like the Highland Building.
- Adopt a delay demolish ordinance to prevent unnecessary destruction of Carlisle's historic buildings and structures.
- Increase active resident participation and volunteerism in cultural activities that celebrate Carlisle's local history.

**9. Open Space, Recreation & Natural Resources**

- Through the updated 2020 Open Space, Recreation and Natural Resources Plan, continue to provide coordinated management, investment, and maintenance of open space, recreation and conservation lands.
- Protect and promote agricultural activities, land use, and traditions with sustainable practices.
- Provide new and enhance existing trails and connectivity to open space and recreation facilities.
- Assess open space and conservation land acquisition opportunities in the context of other Town needs and goals.
- Review local bylaws, zoning, and policies to evaluate their efficacy in achieving desired goals.

## 7. Actions (TBD)