

Carlisle – Climate Resilient Carlisle

Project Narrative

Please provide your full project narrative. Use the rating system as a guide for what information should be included in the narrative to ensure the maximum score possible for your project. Please keep in mind that reviewers will likely not have historic knowledge of your MVP process, this project, or supporting efforts – please provide a full, yet succinct explanation for each question. This section should be completed, saved as a PDF, and uploaded to the online form in the appropriate section. Total size of all documents attached to the online form cannot exceed 25 MB. Please keep responses to a reasonable length, under 25 pages.

1. PROJECT DESCRIPTION, RATIONALE, AND CLIMATE DATA (13 POINTS)

- Up to **8 points** for description & rationale, including:
 - What climate change impacts/vulnerabilities this project will address
 - If applicable, please reference the Climate Resilience Standards Tool climate exposure ratings and how the project is responding to the climate exposures identified through the tool.
 - Please also review the [Massachusetts Climate Change Assessment report](#), and describe if and how your project addresses the top impacts identified in your region or statewide.
 - What the project's goals and objectives are.
 - If the project is one component/phase of a larger project, please succinctly describe previously completed or future work and the vision for the overall project in addition to the proposed component/phase.
 - Why the project was chosen.
 - How the project will positively impact the [resiliency](#) of the site and community.
 - How the project reflects municipal priorities established in the community's MVP-approved report or subsequent climate resilience report that built upon the MVP process. Eligible entities that are not a city or town should apply for projects that align with priorities in an [MVP-approved municipal climate resilience plan](#). Exceptions may be made for newly eligible Tribes who should demonstrate that the project aligns with a climate resilience priority of the Tribe.

The Town of Carlisle is seeking technical assistance to incorporate strategic, comprehensive, and data-driven climate resilience best practices into our local rules, regulations, and bylaws for land use, in a coordinated and integrated manner. This project will build capacity locally to better handle the following climate impacts and vulnerabilities, which are local as well as regional: drought, ecological changes, extreme heat, inland flooding, severe winter storms, Nor'easters, and hurricanes, tornados, and other extreme weather events. Carlisle is within the Eastern Inland region within the Massachusetts Climate Change Assessment Report; this project will also build capacity to handle some of the top impacts identified for the Eastern Inland region by planning for redundant/backup power systems to reduce spoilage of food during power outages and maintain safe spaces for vulnerable populations during extreme weather events; reducing flood damage to inland buildings via upsized and/or nature-based stormwater systems; using nature-based solutions to capture runoff and maintain ecosystem health; preserving and protecting forests; and including public safety personnel in the project to promote integration of critical infrastructure for emergency response into any policy, regulation, and bylaw changes as needed.

The main goal of this project will be to ensure that our local policies, regulations and bylaws require design of projects based on the best available scientific information related to the impacts of climate change, so that Carlisle can continue to grow in a managed way that respects and protects the natural environment, which in turn promotes climate resilience. Holistically, recommendations resulting from this effort shall focus on best

practices for the man-made environment and human resilience (i.e., building and engineering practices, electrification, waste disposal, etc.) with an emphasis on nature-based solutions that also strive to sustain and benefit natural resources, watershed and aquifer health, local ecology, biodiversity and species habitat – noting where certain practices contain inherent conflicts that will require conscientious choices and/or offsets. The recommendations shall also include best practices for performance metrics, data collection, ongoing monitoring, evaluation, analysis, and periodic updating.

Another goal of the project is to build institutional capacity by fostering relationships among staff towards a shared value of promoting climate resiliency. The project will engender ongoing, necessary, and in-depth conversations about how we should be conducting local processes, and how we can work as a team to ensure better outcomes for projects that align with a comprehensive vision for land use practices.

This project was chosen for a few key reasons. As noted within the Annual Progress Report (see Attachment D), the Town has been strategic in first creating the structure needed to effectuate change before embarking on certain initiatives. The Town took a couple of steps to create the structure – namely adding staff capacity and establishing the Environmental Sustainability Committee. Starting with an project that incorporates climate resilience best practices into local policies, regulations and bylaws is in keeping with the Town’s strategic approach as it will help create a structural lens through which to evaluate all projects. Another reason this project was chosen was because it was mentioned in multiple framework documents in Town, and as such it seemed like it would have broad support at the staff, volunteer, and community levels. Specifically, the 2022 Carlisle Forward Master Plan includes the stated Recommendation 15E of “incorporating environmental stewardship and sustainability impacts into municipal decision-making.” In addition, the Environmental Sustainability Committee’s FY23 Work Plan re-states this Master Plan recommendation and expresses a commitment to working with other Town committees and departments to advance it. Throughout the ESC’s Work Plan, there are many instances in which the ESC recommends reworking local policies to include greener, more sustainable practices (i.e., maintenance/cleaning practices, ecological landscaping, native plantings, use of hazardous chemicals & materials, land consumptive/disruptive land uses, construction vehicles, institutional/commercial energy use reporting, Net Zero/low embodied carbon buildings, carbon sequestration data, water consumption, tree protection, deconstruction, agriculture/soil, etc.), many of which echo or expand upon issues that came up during the Community Resilience Building process for MVP. Given the overlap between the Master Plan, the ESC Work Plan, and the MVP process and reporting, this project will help create a structure that will set the Town up to achieve many stated and broadly accepted goals related to climate resiliency.

- **1 point** for utilization and report from the [Climate Resilience Design Standards Tool](#)
 - ☒ Project is NOT focused on a specific site and/or does NOT include physical asset/s --e.g., building, infrastructure, natural resources-- at any project phase
 - You are not required to submit a report and will receive this point.
- Up to **3 points** for the degree to which the most up-to-date climate science and data (including data found on resilientma.mass.gov, the [Climate Resilience Design Standards Tool](#), local-level studies, traditional ecological knowledge, and/or other qualitative forms of data) will be utilized, including specific reference to the climate data utilized.
 - **For Project Type 1:** Planning, Assessments, Capacity Building, and Regulatory Updates– What specific climate data will be used to inform the process or report and how will they be utilized? If it is a regulatory project, how will the regulations use climate data to ensure they will provide reasonable and effective guidance into the future?

The point of this project will be to incorporate the most-up-to-date climate science, data, and projections – going beyond the State’s regulations where appropriate – into local policies, regulations and bylaws, such that applicants know how they need to design projects and the Town knows what criteria to use to evaluate projects; this will also establish a standard that the Town itself should follow for Town projects. Specific examples of local regulations that will be reviewed during this project include but are not limited to the Zoning Bylaw, Planning Board Rules and Regulations, Subdivision Rules and Regulations, Wetlands Bylaw, Board of Health Regulations,

Historic provisions within the General Bylaw, and other Town policies related to land use and management, sustainability, and vulnerability preparedness vis-à-vis the impacts of climate change. In addition, during this process, it will be essential for the consultant to provide the following helpful guidance: information about what similar towns (i.e., Sherborn, Harvard) are doing; additional policies, regulations, and bylaws that a town like Carlisle could benefit from adopting; and a weighted priority list, schedule, and strategy for adoption.

The MVP Core Team has already identified some revisions to explore, which include: the design storm used for stormwater design for roads and other infrastructure projects, utilizing more realistic Inundation-Duration-Frequency curve numbers for rainwater/flooding events; updates to private well guidelines based on new DEP information, including an exploration of how to require wells to be drought-resistant, and how to accommodate completely separate graywater systems; adding local buffering requirements to the local wetlands bylaw; structuring a sustained funding source for ongoing land maintenance and invasive species management given resource constraints; establishing a town-wide tree policy and right-to-farm policy; and accommodations for battery storage and renewable energy production in the Zoning Bylaw.

Specific climate tools and climate data that we would expect to become integrated into our policies, regulations, and bylaws, or at a minimum utilized to inform this project, include the tools identified by MVP, such as:

- *Best practices and design standards identified in the Climate Resilience Design Standards Tool
 - *If possible, consider requirement that all projects utilize this tool to obtain an EJ score, ecosystem benefits score, exposure score, and asset risk analysis**
- *Traditional Ecological Knowledge (TEK) and other forms of qualitative data*
- *Mapped climate change projections and data in the Resilient MA Map Viewer*
- *Nature-based solutions promoting the protection, restoration, and management of ecological systems through policies, land acquisition, etc.*
- *Drought Indices prepared by Drought Management Task Force, and recommendations within MA Drought Management Plan*
- *Water conservation actions for municipalities identified within the MA Water Conservation Toolkit*
- *MA Climate and Hydrological Risk Project*
- *Benefits and Mapping Analysis Program for air pollution and pollen analyses*
- *Recommendations for inland flooding, drought, and extreme weather events from the State Hazard Mitigation and Climate Action Plan*
- *USEPA models, academic literature, white papers and reports*
- *Rainfall data for the 24-hour design storm or other design storm appropriate to Carlisle's recent flood history and projections based on Scaled IDF Curve Dataset*
- *Projected values for extreme heat based on Carlisle's recent temperature history or regional data such as MAPC Land Surface Temperature modeling*
- *Tools and data related to decarbonization of buildings*
- *GIS data for local critical infrastructure (to be developed soon)*

While it will be important to update certain local policies, regulations, and bylaws, it will be similarly important not to freeze them in time by being too specific about the climate science and data to be used. Wording will need to be carefully crafted to require certain specifics, but also to allow for evolving science and technology, and to ensure that the Town is able to keep pace with and calibrate based on actual project outcomes. For land use boards and committees to provide reasonable and effective guidance into the future, requirements for data collection, ongoing monitoring, evaluation, and analysis will need to be included in any updates to local policies, regulations, and bylaws, in consideration of staff capacity to understand, analyze, and make recommendations to their boards and committees based on findings that are well-documented and not arbitrary.

- **1 point** for inclusion of MVP yearly progress report ([Attachment D](#))
 - Required for all applicants, even those who recently completed the MVP Planning Grant process. Please fill it out to the best of your ability.

See Attachment D. The MVP Core Team met on April 18, 2023.

2. Timeline, Scope, and Budget (15 points)

- Up to **4 points** for project scope. Please detail each task/step of the project here and include a summarized version in [Attachment B](#). For each task, please identify if it is dependent on completion of another task. If applying for a two-year project, applicants should divide project tasks between fiscal years in distinct phases. If EEA is able to provide funding in FY24 but unable to provide FY25 funding for the applicant's proposal under this BID/RFR, the applicant may reapply for that phase of the project in a future funding round.

FY24

Task 1: Project Kick-Off, Management, and Reporting

Sub-task 1.1 Kick-off meeting with Town, EEA, and Consultant

At the kick-off meeting, the Town's MVP Working Group, selected consultant, and EEA will become acquainted, discuss the overall timeline for the project, any key deliverables, and expectations for outcomes. EEA and staff will have a chance to answer specifics about grant management, reimbursement, and any other questions that may arise.

Sub-task 1.2 Monthly Progress Reports FY24

Staff will submit a brief Monthly Progress Report to the MVP program coordinator outlining where the process is, what tasks have been completed, whether any changes to the timeline have been made or are warranted, and what the next steps are.

Sub-task 1.3 Working Group Meeting Prep/Coordination Calls w/Planner (3 to 5)

The consultant and planner will have 3-5 coordination calls to prepare and review materials (i.e., Agenda, draft documents) for upcoming MVP Working Group meetings and/or debrief from meetings and Community Forum 1, to ensure we stay on the same page throughout the process regarding expectations for moving forward.

Task 2: Public Involvement and Community Engagement in FY24

Sub-task 2.1 Preparation and Distribution of Print Materials for Community Forum 1

Staff will take the lead on preparing and distributing print materials for Community Forum 1, in accordance with MVP guidelines. Print materials will include posters, direct mailings, and backpack mailers, which will be distributed and posted at least 14 days prior to the event. Materials for Community Forum 1 will include date, time, location, the zoom link, and how to access translation services, if needed. In addition, print materials will be translated into the 3 most common non-English languages spoken in Carlisle.

Sub-task 2.2 Articles for Mosquito and Town Newsletter re: Community Forum 1

Staff will prepare 1 article for the Carlisle Mosquito and Town Newsletter to describe the project and advertise Community Forum 1. Articles for Community Forum 1 will include date, time, location, the zoom link, and how to access translation services, if needed.

Sub-task 2.3 Updates to Project Webpage & Creation of Online Feedback Form

Staff will manage the project webpage throughout the process. The project webpage already exists and will be updated to include any new visual information, links to videos and documents, information about Community Forum 1 (date, time, location, how to access it, etc.). Staff will create an online feedback form. The page will be able to be translated if needed.

<https://www.carlislema.gov/1162/Municipal-Vulnerability-Preparedness>

Sub-task 2.4 Social Media Communication re: Community Forum 1

Staff will create blurbs to push out on our social media platforms (FB, Twitter, Instagram). The blurb for Community Forum 1 will include date, time, location and a link to the meeting, as well as contact information if translation services are needed.

Sub-task 2.5 Language Translation for Digital and Print Materials

Staff will work with the consultant to identify a Language Translation service, which may be a separate contract, or a local volunteer. This service will translate all print and digital materials into the 3 most prevalent non-English languages spoken in Carlisle and be available to help with language translation at meetings if needed.

Sub-task 2.6 Community Forum 1 – Project Kick-Off w/BCCs, MVP Core Team, Public

Community Forum 1 will be a Kick-Off of the project, including Boards, Committees and Commissions, the MVP Core Team and Working Group, and the public. The reason for an early Community Forum is to let stakeholders know that the Town's land use policies, regulations and bylaws are under review from a climate resilience standpoint, to outline the anticipated process, and gather any ideas and information the public has about what to include and prioritize. We want to ensure that the public is involved from the get-go and build momentum for the project early on. Preparation for this event will include an agenda, presentation, posters, a poll to get feedback, and potential break-out sessions – everything will be in-person and remote.

Sub-task 2.7 Remote Forum Management, Videography of Community Forum 1

At least one separate dedicated staff-person will be needed to manage the remote participation component of the Forum, via zoom, which includes managing participants, screen-sharing materials, monitoring the chat/Q&A, facilitating break-out sessions, etc. Simultaneously, the Town will engage our meeting videographer to prepare a video of the Forum that can be uploaded to the project webpage afterward.

Sub-task 2.8 Food/Refreshments for Community Forum 1

Light refreshments will be provided for the in-person component of the Forum, to be catered by a local entity such as Fern's Country Store.

Sub-task 2.9 COAHS Van Transportation to Community Forum 1

COAHS has agreed to provide transportation to and from the Community Forum.

Sub-task 2.10 Advertisements for MVP Discussions w/Boards, Committees & Commissions

Staff will advertise all individual discussions with Boards, Committees and Commissions at least 14 days prior, via distribution of posters throughout Town. Board, Committee and Commission agendas are also typically published in the Carlisle Mosquito and posted at Town Hall in compliance with the requirements of the Open Meeting Law.

Sub-task 2.11 Articles for Mosquito and Town Newsletter re: Project Update

Staff will prepare 1 article for the Mosquito and Town Newsletter with an update on the project after the Deep Dives with each Board, Committee or Commission involved.

Sub-task 2.12 Ongoing Updates to Project Webpage, including video uploading

Staff will manage the project webpage throughout the process. The project webpage already exists and will be updated to include any new visual information, links to videos and documents, etc. The page will be able to be translated if needed.

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Sub-task 2.13 Drop-In Staff Hours @ Town Hall

Staff are available to the public during regular working hours. However, Planning staff will dedicate two hours each month during which the public can drop-in and ask questions about the MVP project. These hours will be varied (daytime, evening), and will be advertised via posters located around Town.

Sub-task 2.14 Staffed Tables at Community Events (RTSD, OHD)

Staff and the consultant will prepare posters and attend two community events in FY24: Route to Sustainability Day in April, and Old Home Day in June.

Sub-task 2.15 Staff discussion at COAHS luncheon

The Council on Aging and Human Services (COAHS) hosts regular luncheons for the populations they serve, which present an opportunity for staff from various departments to become acquainted with them. Staff will attend 1 COAHS luncheon in FY25 to discuss the MVP project.

Task 3: Familiarization with Carlisle

Sub-task 3.1 MVP Working Group Meeting 1 – Strategy for Familiarization w/Carlisle

The first MVP Working Group Meeting with the consultant will start with introductions with each member describing their background, interest in the project, and hoped for outcomes of the project. The group will then discuss the importance of ensuring the consultant takes time to familiarize with Carlisle, as a one-size-fits-all approach rarely works in a Town with unique challenges – such as lack of water and sewer infrastructure – and understanding the on-the-ground realities of Carlisle will be essential to project success. The group will strategize with the consultant on the best ways for the consultant to familiarize with the Town, to supplement or fill in some of the outlined tasks herein.

➔ Community Forum 1 will take place at this point

Sub-task 3.2 Review of Local Policies, Regulations, Bylaws

The consultant will conduct a thorough review of all the local policies, regulations, and bylaws relevant to this project. Staff will supply links to materials, and copies of any materials not readily available digitally. As a fail-safe, the consultant shall identify and ask for any documents the Town should have. During this review, the consultant shall be actively thinking of initial recommendations. In addition, it will be essential for the consultant to provide the following helpful guidance: information about what similar towns (i.e., Sherborn, Harvard) are doing, and additional policies, regulations, and bylaws that a Town like Carlisle could benefit from adopting.

Sub-task 3.3 Individual Discussions with Land Use Departments to understand priorities

The consultant shall meet individually with all Land Use Departments identified herein to ask questions and gain an understanding for how things work locally, what the current challenges are, and what each department feels the priorities should be. The consultant shall gather any ideas each department already has about including climate resilience best practices into local policies, regulations, and bylaws.

Sub-task 3.4 Initial Meeting with each Land Use Board, Committee or Commission to ratify priorities

After the consultant has met with all staff departments, the consultant shall have an initial meeting with each Land Use Board, Committee or Commission to discuss their process, challenges, and priorities – and to determine if there are additional or different priorities to consider.

Sub-task 3.5 MVP Working Group Meeting 2 – Report on Initial Findings

MVP Working Group Meeting 2 will be an opportunity for the consultant to report on initial findings after Community Forum 1 and their reconnaissance with land use staff and boards is complete. The report shall identify areas of overlap and areas of potential conflict, right up front. The report shall also identify all public feedback, and ways to address or incorporate it. The Working Group shall discuss and give guidance to the consultant on how to proceed. The guidance may be a request for the consultant to provide options for different ways areas of conflict or public feedback can be addressed or accommodated.

Task 4: Formulation of Initial Recommendations – Deep Dives w/Departments

Sub-task 4.1 Preparation of Initial Recommendations

The consultant shall prepare a set of initial recommendations for modifications/additions to each land use policy, regulation or bylaw, based on the discussions and information gathered during the familiarization process. Ideally, the consultant starts working on this initial set of recommendations during the familiarization process and refines it as new information is learned. The consultant shall also recommend additional policies, regulations, and bylaws that a small Town like Carlisle could benefit from having.

Sub-task 4.2 MVP Working Group Meeting 3 – Discussion of Initial Recommendations

MVP Working Group Meeting 3 will be an opportunity for the consultant to share their initial recommendations with the Working Group before taking them around to each department, Board, Committee and Commission. During this meeting, members of the Working Group should provide feedback about aspects they think will work well, and aspects that may be problematic, so the consultant can further prepare for the deep dives with each department, Board, Committee and Commission. The Working Group shall review and discuss a strategy for the deep dives – modifying the established schedule/order based on availability and upcoming meeting dates, if needed. The Working Group shall also discuss any new public feedback that has been received and strategize on ways to address it or accommodate it.

Sub-task 4.3 Deep Dive with Planning Department / Planning Board

Planning staff shall review and comment on all initial recommendations – shown as redlined changes – to Planning Board policies, regulations, and bylaws, and on others, as may be related, helpful or necessary. The consultant shall revise as needed. The consultant and staff shall then discuss all the initial recommendations with the Planning Board at an open public meeting that is advertised at least 14 days in advance via posters around Town. Planning staff shall flag any proposed bylaw changes that specifically impact the work of the Zoning Board of Appeals and invite them to the discussion. The consultant and Board shall engage in a healthy discussion and allow for robust public participation. The consultant shall gather all public feedback provided at the meeting. The consultant shall flag any proposed conflict areas or ideas that should be discussed by the entire MVP Working Group, in case they require revisiting by and/or negotiation with other departments, Boards, Committees, or Commissions.

Sub-task 4.4 Deep Dive with Health Department / Board of Health

Health staff shall review and comment on all initial recommendations – shown as redlined changes – to Board of Health policies, regulations, and bylaws, and on others, as may be related, helpful or necessary. The consultant shall revise as needed. The consultant and staff shall then discuss all the initial recommendations with the Board of Health at an open public meeting that is advertised at least 14 days in advance via posters around Town. The consultant and Board shall engage in a healthy discussion and allow for robust public participation. The consultant shall gather all public feedback provided at the meeting. The consultant shall flag any proposed conflict areas or ideas that should be discussed by the entire MVP Working Group, in case they require revisiting by and/or negotiation with other departments, Boards, Committees, or Commissions.

Sub-task 4.5 Deep Dive with Conservation Department / Conservation Commission

Conservation staff shall review and comment on all initial recommendations – shown as redlined changes – to Conservation Commission policies, regulations, and bylaws, and on others, as may be related, helpful or necessary. The consultant shall revise as needed. The consultant and staff shall then discuss all the initial recommendations with the Conservation Commission at an open public meeting that is advertised at least 14 days in advance via posters around Town. The consultant and Commission shall engage in a healthy discussion and allow for robust public participation. The consultant shall gather all public feedback provided at the meeting. The consultant shall flag any proposed conflict areas or ideas that should be discussed by the entire

MVP Working Group, in case they require revisiting by and/or negotiation with other departments, Boards, Committees, or Commissions.

Sub-task 4.6 Deep Dive with Historic / Historical Commission

Historic staff shall review and comment on all initial recommendations – shown as redlined changes – to Historical Commission policies, regulations, and bylaws, and on others, as may be related, helpful or necessary. The consultant shall revise as needed. The consultant and staff shall then discuss all the initial recommendations with the Historical Commission at an open public meeting that is advertised at least 14 days in advance via posters around Town. The consultant and Commission shall engage in a healthy discussion and allow for robust public participation. The consultant shall gather all public feedback provided at the meeting. The consultant shall flag any proposed conflict areas or ideas that should be discussed by the entire MVP Working Group, in case they require revisiting by and/or negotiation with other departments, Boards, Committees, or Commissions.

Sub-task 4.7 Deep Dive with Housing Trust (and Planning staff)

Planning staff shall review and comment on all initial recommendations – shown as redlined changes – to Housing Trust policies, regulations, and bylaws, and on others, as may be related, helpful or necessary. The consultant shall revise as needed. The consultant and staff shall then discuss all the initial recommendations with the Housing Trust at an open public meeting that is advertised at least 14 days in advance via posters around Town. The consultant and Trust shall engage in a healthy discussion and allow for robust public participation. The consultant shall gather all public feedback provided at the meeting. The consultant shall flag any proposed conflict areas or ideas that should be discussed by the entire MVP Working Group, in case they require revisiting by and/or negotiation with other departments, Boards, Committees, or Commissions.

Sub-task 4.8 Deep Dive with Public Safety, Building, and DPW

Public Safety, Building, and DPW staff shall review and comment on all initial recommendations – shown as redlined changes – to all policies, regulations, and bylaws to ensure that any proposed changes are not problematic from a public safety standpoint and are promoting and/or taking into consideration unique local characteristics and providing accommodations as needed. The consultant shall flag any proposed conflict areas or ideas that should be discussed by the entire MVP Working Group, in case they require revisiting by and/or negotiation with other departments, Boards, Committees, or Commissions.

Sub-task 4.9 Deep Dive with Sustainability / Environmental Sustainability Committee (and Planning staff)

After the documents have been circulated and discussed in Deep Dive format with the other departments, Planning/Sustainability staff shall review and comment on all recommendations – shown as redlined changes – to all policies, regulations, and bylaws. The consultant shall revise as needed. The consultant and staff shall then discuss all the initial recommendations with the Environmental Sustainability Committee at an open public meeting that is advertised at least 14 days in advance via posters around Town. The consultant and Committee shall engage in a healthy discussion and allow for robust public participation, making sure to include additional entities (i.e., the Ag Committee) when proposed recommendations impact their work. The consultant shall gather all public feedback provided at the meeting. The consultant shall flag any proposed conflict areas or ideas that should be discussed by the entire MVP Working Group, in case they require revisiting by and/or negotiation with other departments, Boards, Committees, or Commissions.

Sub-task 4.10 Deep Dive with Town Management / Select Board

Finally, after the Land Use Boards, Committees, and Commissions are aligned on modifications to local policies, regulations, and bylaws, the consultant and Planner shall present all changes to

Town Management staff for review and comment. The consultant shall revise as needed. The consultant and staff shall then discuss all the initial recommendations with the Select Board at an open public meeting that is advertised at least 14 days in advance via posters around Town. The consultant and Board shall engage in a healthy discussion and allow for robust public participation. The consultant shall gather all public feedback provided at the meeting. The consultant shall flag any proposed conflict areas or ideas that should be discussed by the entire MVP Working Group, in case they require revisiting by and/or negotiation with other departments, Boards, Committees, or Commissions.

Sub-task 4.11 MVP Working Group Meeting 4 – Report on Deep Dives

MVP Working Group Meeting 4 will be an opportunity for the consultant to report on the Deep Dives, specifically noting any areas of conflict or new ideas for the whole group to discuss. The consultant shall also provide documentation of all public feedback, with ideas for how to address or accommodate it for the Working Group to consider. The Working Group shall provide guidance to the consultant on ways to further refine the recommendations. If the grant is going to continue into FY25, the Working Group should also discuss next steps with the consultant.

FY25

Task 5: Project Management and Reporting

Sub-task 5.1 Monthly Progress Reports FY25

Staff will submit a brief Monthly Progress Report to the MVP program coordinator outlining where the process is, what tasks have been completed, whether any changes to the timeline have been made or are warranted, and what the next steps are.

Sub-task 5.2 Project Case Study

At the end of the project, staff will work with the consultant to submit a final project case study report, power point presentation/slide, and project photos.

Sub-task 5.3 Working Group Meeting Prep/Coordination Calls w/Planner (3-5)

The consultant and planner will have 3-5 coordination calls to prepare and review materials (i.e., Agenda, draft documents) for upcoming MVP Working Group meetings and/or debrief from meetings and Community Forum 2, to ensure we stay on the same page throughout the process regarding expectations for moving forward.

Task 6: Public Involvement and Community Engagement in FY25

Sub-task 6.1 Preparation and Distribution of Print Materials for Community Forum 2

Staff will take the lead on preparing and distributing print materials for Community Forum 2, in accordance with MVP guidelines. Print materials will include posters, direct mailings, and backpack mailers, which will be distributed and posted at least 14 days prior to the event. Materials for Community Forum 2 will include date, time, location, the zoom link, and how to access translation services, if needed. In addition, print materials will be translated into the 3 most common non-English languages spoken in Carlisle.

Sub-task 6.2 Articles for Mosquito and Town Newsletter re: Community Forum 2

Staff will prepare 1 article for the Carlisle Mosquito and Town Newsletter to describe the project and advertise Community Forum 2. Articles for Community Forum 2 will include date, time, location, the zoom link, and how to access translation services, if needed.

Sub-task 6.3 Updates to Project Webpage re: Community Forum 2

Staff will manage the project webpage throughout the process. The project webpage will be updated to include any new visual information, links to videos and documents, information

about Community Forum 2 (date, time, location, how to access it, etc.). Staff will update the online feedback form if needed. The page will be able to be translated if needed.

<https://www.carlislema.gov/1162/Municipal-Vulnerability-Preparedness>

Sub-task 6.4 Social Media Communication re: Community Forum 2

Staff will create blurbs to push out on our social media platforms (FB, Twitter, Instagram). The blurb for Community Forum 2 will include date, time, location and a link to the meeting, as well as contact information if translation services are needed.

Sub-task 6.5 Language Translation for Digital and Print Materials

The contracted Language Translation service will translate all print and digital materials into the 3 most prevalent non-English languages spoken in Carlisle and be available to help with language translation at meetings if needed.

Sub-task 6.6 Community Forum 2 – Presentation of Refined Recommendations

Community Forum 2 will be held after the consultant's Deep Dives with each Board, Committee and Commission involved in the project. At Community Forum 2, the consultant will present the refined recommendations and seek input from the public generally and via a few key questions to be determined once it is clear whether there are areas of opportunity and conflict. The public will be informed that feedback provided at this Forum will be included to the maximum extent practicable, given that the recommended changes are nearly final at this point. Preparation for this event will include an agenda, presentation, posters, a poll to get feedback, and potential break-out sessions – everything will be in-person and remote.

Sub-task 6.7 Remote Forum Management, Videography of Community Forum 2

At least one separate dedicated staff-person will be needed to manage the remote participation component of the Forum, via zoom, which includes managing participants, screen-sharing materials, monitoring the chat/Q&A, facilitating break-out sessions, etc. Simultaneously, the Town will engage our meeting videographer to prepare a video of the Forum that can be uploaded to the project webpage afterward.

Sub-task 6.8 Food/Refreshments for Community Forum 2

Light refreshments will be provided for the in-person component of the Forum, to be catered by a local entity such as Fern's Country Store.

Sub-task 6.9 COAHS Van Transportation to Community Forum 2

COAHS has agreed to provide transportation to and from the Community Forum.

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Sub-task 6.14 Staffed Tables at Community Events (RTSD, OHD)

Staff and the consultant will prepare posters and attend two community events in FY25: Route to Sustainability Day in April, and Old Home Day in June.

Sub-task 6.15 Staff discussion at COAHS luncheon

The Council on Aging and Human Services (COAHS) hosts regular luncheons for the populations they serve, which present an opportunity for staff from various departments to become acquainted with them. Staff will attend 1 COAHS luncheon in FY25 to discuss the MVP project.

Sub-task 6.16 Full-Court Press Advertisement of Public Comment Period

Staff will utilize digital and print outreach methods to advertise the public comment period for all redlined refined recommendations to local land use policies, regulations, and bylaws. In addition to posting posters around Town, staff will write 1 article for publication in the Mosquito and Town Newsletter and prepare a blurb to be pushed out on social media. The website will be updated to host all of the redlined versions of the documents, and the online feedback form will be monitored.

Task 7: Refinement of Recommendations – Circle Back w/Departments

Sub-task 7.1 Preparation of Refined Recommendations, Prep for Community Forum 2

The consultant shall prepare a set of refined recommendations for modifications/additions to each land use policy, regulation, or bylaw, based on the discussions and information gathered during the Deep Dive process, and subsequent follow up with the MVP Working Group. Ideally, the consultant starts working on this refined set of recommendations during the Deep Dive process and continues to refine it further as new information is learned. The consultant shall also begin preparing materials for Community Forum 2.

Sub-task 7.2 MVP Working Group Meeting 5 – Review Refined Recommendations, Preparation for Community Forum 2, and Circle Back with Departments

MVP Working Group Meeting 5 will be an opportunity for the consultant to go over all the refined recommendations with the Working Group, and to strategize on how best to convey the information at Community Forum 2. The Working Group shall review any new public feedback that has been received and discuss how to address or accommodate it. The Working Group shall also discuss areas of conflict and opportunity, and whether there are key questions to ask the public at Community Forum 2 to get additional feedback toward finalization of the recommendations. The Working Group shall discuss the strategy for circling back with departments, and adjust the schedule based on staff availability and upcoming meeting dates, if needed.

➔ Community Forum 2 will take place at this point

Sub-task 7.3 Circle Back with Planning Department / Planning Board

Planning staff shall review and comment on all refined recommendations – shown as redlined changes – to Planning Board policies, regulations, and bylaws, and on others, as may be related, helpful or necessary. The consultant and staff shall then discuss all the refined recommendations with the Planning Board at an open public meeting that is advertised at least 14 days in advance via posters around Town. Planning staff shall flag any proposed bylaw changes that specifically impact the work of the Zoning Board of Appeals, and invite them to the discussion. The consultant and staff shall also present potential areas of conflict and opportunity to the Planning

Board and note recommendations from the MVP Working Group on how to handle them. The Planning Board shall also discuss feedback received at Community Forum 2 and make revisions if necessary. The consultant and Board shall engage in a healthy discussion and allow for robust public participation. The consultant shall gather all public feedback provided at the meeting. The consultant shall flag any persistent conflict areas for discussion by the MVP Working Group.

Sub-task 7.4 Circle Back with Health Department / Board of Health

Health staff shall review and comment on all refined recommendations – shown as redlined changes – to Board of Health policies, regulations, and bylaws, and on others, as may be related, helpful or necessary. The consultant and staff shall then discuss all the refined recommendations with the Board of Health at an open public meeting that is advertised at least 14 days in advance via posters around Town. The consultant and staff shall also present potential areas of conflict and opportunity to the Board of Health and note recommendations from the MVP Working Group on how to handle them. The Board of Health shall also discuss feedback received at Community Forum 2 and make revisions if necessary. The consultant and Board shall engage in a healthy discussion and allow for robust public participation. The consultant shall gather all public feedback provided at the meeting. The consultant shall flag any persistent conflict areas for discussion by the MVP Working Group.

Sub-task 7.5 Circle Back with Conservation Department / Conservation Commission

Conservation staff shall review and comment on all refined recommendations – shown as redlined changes – to Conservation Commission policies, regulations, and bylaws, and on others, as may be related, helpful or necessary. The consultant and staff shall then discuss all the refined recommendations with the Conservation Commission at an open public meeting that is advertised at least 14 days in advance via posters around Town. The consultant and staff shall also present potential areas of conflict and opportunity to the Conservation Commission and note recommendations from the MVP Working Group on how to handle them. The Conservation Commission shall also discuss feedback received at Community Forum 2 and make revisions if necessary. The consultant and Commission shall engage in a healthy discussion and allow for robust public participation. The consultant shall gather all public feedback provided at the meeting. The consultant shall flag any persistent conflict areas for discussion by the MVP Working Group.

Sub-task 7.6 Circle Back with Historic / Historical Commission

Historic staff shall review and comment on all refined recommendations – shown as redlined changes – to Historical Commission policies, regulations, and bylaws, and on others, as may be related, helpful or necessary. The consultant and staff shall then discuss all the refined recommendations with the Historical Commission at an open public meeting that is advertised at least 14 days in advance via posters around Town. The consultant and staff shall also present potential areas of conflict and opportunity to the Historical Commission and note recommendations from the MVP Working Group on how to handle them. The Historical Commission shall also discuss feedback received at Community Forum 2 and make revisions if necessary. The consultant and Commission shall engage in a healthy discussion and allow for robust public participation. The consultant shall gather all public feedback provided at the meeting. The consultant shall flag any persistent conflict areas for discussion by the MVP Working Group.

Sub-task 7.7 Circle Back with Housing Trust (and Planning staff)

Planning staff shall review and comment on all refined recommendations – shown as redlined changes – to Housing Trust policies, regulations, and bylaws, and on others, as may be related, helpful or necessary. The consultant and staff shall then discuss all the refined recommendations with the Housing Trust at an open public meeting that is advertised at least 14 days in advance via posters around Town. The consultant and staff shall also present potential areas of conflict and opportunity to the Housing Trust and note recommendations from the MVP Working Group on how to handle them. The Housing Trust shall also discuss feedback received at Community

Forum 2 and make revisions if necessary. The consultant and Trust shall engage in a healthy discussion and allow for robust public participation. The consultant shall gather all public feedback provided at the meeting. The consultant shall flag any persistent conflict areas for discussion by the MVP Working Group.

Sub-task 7.8 Circle Back with Public Safety, Building, and DPW

Public Safety, Building, and DPW staff shall review and comment on all refined recommendations – shown as redlined changes – to all policies, regulations, and bylaws to ensure that any proposed changes are not problematic from a public safety standpoint and are promoting and/or taking into consideration unique local characteristics and providing accommodations as needed. The consultant shall flag any persistent conflict areas for discussion by the MVP Working Group.

Sub-task 7.9 Circle Back with Sustainability / Environmental Sustainability Committee

After the documents have been circulated and discussed in Circle Back format with the other departments, Planning/Sustainability staff shall review and comment on all recommendations – shown as redlined changes – to all policies, regulations, and bylaws. The consultant and staff shall then discuss all the refined recommendations with the Environmental Sustainability Committee at an open public meeting that is advertised at least 14 days in advance via posters around Town. The consultant and staff shall also present potential areas of conflict and opportunity to the Environmental Sustainability Committee and note recommendations from the MVP Working Group on how to handle them. The Environmental Sustainability Committee shall also discuss feedback received at Community Forum 2 and make revisions if necessary. The consultant and Committee shall engage in a healthy discussion and allow for robust public participation, making sure to include additional entities (i.e., the Ag Committee) when proposed recommendations impact their work. The consultant shall gather all public feedback provided at the meeting. The consultant shall flag any persistent conflict areas for discussion by the MVP Working Group.

Sub-task 7.10 Circle Back with Town Management / Select Board

Finally, after the Land Use Boards, Committees, and Commissions are aligned on refined modifications to local policies, regulations, and bylaws, the consultant and Planner shall present all changes to Town Management staff for review and comment. The consultant shall revise as needed. The consultant and staff shall then discuss all the refined recommendations with the Select Board at an open public meeting that is advertised at least 14 days in advance via posters around Town. The consultant and Board shall engage in a healthy discussion and allow for robust public participation. The consultant shall gather all public feedback provided at the meeting. The consultant and staff shall note the persistent conflict areas for discussion by the MVP Working Group, so the Select Board is aware and can provide feedback.

Sub-task 7.11 MVP Working Group Meeting 6 – Report on Circle Back, Discuss Next Steps

MVP Working Group Meeting 6 will be an opportunity for the consultant to report on the Circle Back effort with departments, Boards, Committees and Commissions, specifically noting any persistent areas of conflict or concern, and any feedback received on ways to address them. The MVP Working Group shall give guidance to the consultant on how to finalize the recommendations and shall discuss next steps for the project. It may be possible that certain bylaw changes can be taken up at spring 2025 Town Meeting, but the whole group should strategize on the best way to roll out all the recommended modifications.

Task 8: Finalization of Recommendations & Strategy/Preparation for Adoption

Sub-task 8.1 Public Comment Period

Prior to finalizing the recommendations, the redlined versions of the refined recommendations will be posted on the project webpage, and a full-court press advertising strategy will be utilized to alert people to a month-long public comment period. Staff will track the feedback and provide it to the consultant and to the MVP Working Group in a coordinated manner.

Sub-task 8.2 Preparation of Finalized Recommendations

The consultant will take all feedback and work with the Planner on addressing it or incorporating it into the finalized recommendations. Finalized recommendations will be provided to the MVP Working Group for review in advance of their final meeting.

Sub-task 8.3 Preparation of Additional Materials for Adoption (when needed)

The consultant shall prepare a draft presentation template, with images when helpful, for staff and volunteers to use when explaining the project and proposed recommendations to various stakeholders. The consultant will also work with Planning staff on the project case study report. Staff will need to be fully versed in the recommendations and take ownership of the adoption process.

Sub-task 8.4 MVP Working Group Meeting 7 – Adoption Strategy & Project Close-Out

The final MVP Working Group Meeting will be an opportunity to make any last simple changes to the finalized recommendations, review the draft case study report and presentation template, discuss a strategy for adoption that includes a timeframe and schedule ordered by priority, and ask any final questions of the consultant. This meeting will be considered a project close-out with the consultant, and handover to staff. Any coordination with the consultant required after this will be through the Planner and will be related to grant management tasks.

- Up to **4 points** for the project budget. Applicants will include budget numbers for each task and sub-task via [Attachment B](#). There is a place to upload Attachment B as an Excel spreadsheet on the online form. The “optional budget data” tab on the spreadsheet is optional but can be used to calculate budget numbers to the extent helpful, identify assumed rates for project team time and in-kind match, or justify high grant funding requests for specific tasks by providing greater detail. The applicant may also use another format to provide greater detail on these items (e.g., a quote from a contractor or a separate spreadsheet). There is a spot to upload additional materials on the online form.⁴

See Attachment B. The “optional budget data” tab was utilized to put a fine point on the staff in-kind hours match, to specifically determine the amount of the ARPA request needed to meet the Town’s match requirement. It should be noted that the proposed ARPA request, when combined with the in-kind staff hours match, will exceed the Town’s match requirement in order to provide a buffer in case there is a lag in staff hours, and to ensure that the Town can cover the costs of printing, mailings, food for the community forums, and a potential contract for translation services.

- Up to **4 points** for a clear project timeline that can be completed within the specified contract period. Please ensure the timeline dates align with start and end dates for each task in [Attachment B](#).

Successful applicants are estimated to be notified by August 2023 with contract negotiations to begin immediately thereafter. Therefore, the project timeline should start in September at the earliest.

FY24 (for this: September 2023 through June 2024)

9/1/23 – 6/30/24 Ongoing Tasks

Task 1: Project Kick-Off, Management, and Reporting

Task 2: Public Involvement and Community Engagement in FY24

10/1/23 – 1/15/24

Task 3: Familiarization with Carlisle

⁴ There are multiple tabs on the Attachment B spreadsheet, including instructions for how to fill out the template and a “tips” sheet to help troubleshoot some common issues with budgets and questions that have come up in previous rounds. Additionally, there is a separate “checklist” attached to COMMBUYS that applicants can use to make sure they have filled out Attachment B correctly.

10/1/23 – 6/30/24

Task 4: Formulation of Initial Recommendations – Deep Dives w/Departments and Boards, Committees & Commissions

FY25 (July 2024 through June 2025)

7/1/24 – 6/30/25 Ongoing Tasks

Task 5: Project Management and Reporting

Task 6: Public Involvement and Community Engagement in FY25

7/1/24 – 2/28/25

Task 7: Refinement of Recommendations – Circle Back w/Departments and Boards, Committees & Commissions

3/1/25 – 5/31/25

Task 8: Finalization of Recommendations & Strategy/Preparation for Adoption

3. Nature-Based Solutions and Environmental Co-Benefits (16 Points)

- Up to **10 points** for the degree to which nature-based solutions (i.e., solutions that protect, restore, or manage ecological systems) are incorporated into the overall vision of this project and how the selected strategy/ies will help the community adapt to existing and projected impacts of climate change. More information about nature-based solutions can be found in the [MVP toolkit](#). Consider the following questions in your response:
 - **For Project Type 1:** Planning, Assessments, Capacity Building, and Regulatory Updates– How will this work “set the stage” for future implementation of nature-based solutions or promote the concept of nature-based solutions?

For a town like Carlisle, which is entirely reliant on site-specific private well and septic capacity, nature-based solutions are critical to the success and resilience of projects with physical assets. Successful projects are not just economically viable for proponents, but also must be environmentally beneficial, ecologically sound, and reduce or mitigate vulnerabilities for the end-user. To that end, we would anticipate that any updates to our local policies, regulations and bylaws will center on nature-based solutions that protect groundwater resources, and design that is mindful of subsurface geology and aids in the protection, restoration and management of other natural resources and ecological systems.

- Up to **6 points** for identifying and describing environmental co-benefits of the proposed project in the table below. For non-implementation projects, please identify how this work will “set the stage” for future co-benefits.

Co-Benefit		Description of how the project will produce this environmental co-benefit
Promotes Biodiversity (habitat restoration, creation, or enhancement)	<input checked="" type="checkbox"/>	This project will specifically look at local wetland and floodplain regulations and bylaws to ensure adequate protection of habitat and riparian areas, which will promote biodiversity.
Restores/remediates Project Site	<input checked="" type="checkbox"/>	This project will look to ensure our policies, regulations and bylaws contain the proper design methods, incentives, and trade-offs to ensure that development/redevelopment requires the co-benefit of site restoration and remediation.

Promotes Environmentally-Sustainable Development / Reduces Development in Climate Vulnerable Areas	X	This project will ensure that our wetland and floodplain bylaws limit development in climate vulnerable areas, and encourage project proponents to site redevelopment in a smart way that accommodates <u>nature-based stormwater design solutions</u> , etc.
Improved Water Quality and/or Increased Groundwater Recharge	<input checked="" type="checkbox"/>	This project will put a heavy focus on nature-based solutions, not just for mitigation of impacts to resource areas, but also the greening of new infrastructure – which will lead to improved water quality and increased groundwater recharge to aquifers that <u>supply our local wells</u> .
Improved Air Quality	<input checked="" type="checkbox"/>	This project will explore policies and bylaw revisions related to greening systems, forest preservation and management, floodplain and riverine protection, and nature-based drainage design, all which have the co-benefit of improving air quality.
Climate Mitigation (carbon sequestration, site-scale improvements for cooling, reduced energy use)	<input checked="" type="checkbox"/>	This project will explore policies to advance site-smart development that works with a site’s existing conditions and resources, maximizing the use of natural energy systems, and preserving capacity for carbon sequestration and other natural benefits.
Other Environmental Co-Benefit:	<input checked="" type="checkbox"/>	This project will result in a wide range of co-benefits, as the project intends to incorporate specific climate resilience best practices into land use policies, regulations, and bylaws.

4. ENVIRONMENTAL JUSTICE AND PUBLIC/REGIONAL BENEFITS (14 POINTS)

Note: Recognizing that there may be members of your community who are highly vulnerable to the impacts of climate change that do not meet the specific criteria or thresholds of an EJ population, the MVP program also recognizes benefits to and involvement of “other priority populations.”⁵ Other priority populations are people or communities who may be disproportionately impacted by climate change due to life circumstances that systematically increase their exposure to climate hazards or make it harder to respond. In addition to factors that contribute to EJ status (i.e., income, race, and language), other factors like physical ability, access to transportation, health status, and age shape whether someone or their community will be disproportionately affected by climate change. This is because of underlying contributors such as racial inequality, financial insecurity, or accessibility barriers that create vulnerability. Projects that benefit and involve other priority populations outside of a mapped EJ area may receive **up to 4 points** in this category by answering the above questions for the other priority population(s).

More information on Environmental Justice, other priority populations, and the MVP program can be found in the [MVP toolkit](#).

Though Carlisle does not have an Environmental Justice population within its borders, it does directly border an Environmental Justice population in Acton on its western boundary. In addition, as identified in the Town’s current Housing Production Plan, which will hopefully be adopted in the next couple of months, Carlisle does have a significant pocket of need – comprised of elderly residents, people on fixed incomes, and those who are

⁵ Referred to in previous RFRs as “Climate Vulnerable Populations”

cost burdened due to the extremely high cost of housing in Carlisle. In addition, other vulnerabilities in Carlisle that our COAHS staff respond to include lack of access to transit, lack of access to technology, food insecurity, and mental and physical health challenges.

Planning staff will work with COAHS staff to tailor advertising and messaging for the Community Forums in ways that will encourage and advance the engagement of our vulnerable populations in the MVP project. In addition, COAHS staff have agreed to make their van available to bring people to and from the Community Forums. Data that we gather on utilization and demand for access to evening events will help inform a future grant that COAHS will be applying for to expand transportation services in Town.

- **Up to 3 points** for the degree to which the project has broad and multiple community benefits. Rationale should include:
 - How the project will provide the highest level of climate resilience for the greatest number of people and/or largest geographic area possible.
 - What community co-benefits the project will provide (e.g., social, economic, public health, recreational, public access, equity, etc.). Please focus on non-environmental co-benefits as environmental co-benefits are included in Question 3 above.

The project will have broad and multiple community benefits for Carlisle residents, the biggest of which may be benefits to public health and quality of life due to improved air and water quality, and the preservation of natural resources which provides recreational and educational opportunities. The project will have economic benefits to the Town and to residents individually as follows: maintaining natural resources helps protect local food sources; nature-based solutions protect water availability and quality; smart use of land reduces energy use and costs; and general protection of natural resources maintains property values.

- **Up to 3 points** if the project is regional/has regional benefits, including:
 - If the project is being led by a regional partnership (i.e., two or more municipalities are submitting the application together). If yes, the application should include a letter of support from each partnering municipality.
 - To what extent resilience benefits of the project go beyond the boundaries of one municipality.

Though the policies, regulations and bylaws that will be updated as part of this project are local, the focus of the project will advantage regional resources (i.e., watersheds, utility grids, etc.) that extend beyond Town borders, and benefit the regional population. As a rural town surrounded by more developed towns, Carlisle plays an important role in regional resiliency to natural hazards and climate change through providing areas for stormwater capture, protecting forests for carbon sequestration, and preserving open space areas for in-situ aquifer recharge. In addition, by protecting its natural resources, wetlands and open space areas, Carlisle ensures the longevity of its critical habitats, open space, and recreational resources, which are enjoyed by many people throughout the region who may not have similar amenities within their own communities.

5. PUBLIC INVOLVEMENT AND COMMUNITY ENGAGEMENT (12 POINTS)

- To complete this section, include a brief narrative and fill out the matrix below. **For guidance and an example showing how to fill out this section and suggested principal and assisting print, digital, and in-person strategies, see [Attachment F](#). Please note that all tasks proposed here should be clearly incorporated into the required Scope/Budget spreadsheet ([Attachment B](#)) as separate tasks that clearly identify how funds will be allocated.**
 - 1 point for each principal strategy (**up to 3 points total**) as described in the narrative and table below. May have one per print, digital, and in-person category or distribute among those categories (e.g., two in-person, one print, no digital). **The review team will consider the effectiveness of each identified strategy and inclusion in the project scope/budget when awarding points.**
 - 0.5 points for each assisting strategy (**up to 3 points total**) as described in narrative and table below. May distribute among print, digital, and in-person categories as desired. **The review team will consider the effectiveness of each identified strategy and inclusion in the project scope/budget when awarding points.**
 - 1 point for each equitable engagement modifier (**up to 4 points total**) as described in the narrative and table below. May distribute among print, digital, and in-person categories as desired. **The review team will consider the effectiveness of each identified strategy and inclusion in the project scope/budget when awarding points.**
 - Up to **2 points** for how stakeholder feedback will be incorporated into the project and mechanism by which stakeholders will be notified of the results of the public involvement and community engagement process and the final project deliverables (see examples in [Attachment F](#)).

Brief Public Involvement and Community Engagement Plan Narrative:

The Town of Carlisle is committed to a robust and multi-pronged community outreach process that proactively seeks feedback and engagement throughout and at key points in the process of integrating climate resilience best practices into local land use policies, regulations and bylaws. As noted, this project was selected in part because it will advance existing efforts for land use board coordination, but also because of the broad appeal it has among staff, volunteers, residents and other stakeholders. It was identified directly and indirectly in some form within the 2022 Carlisle Forward Master Plan, the MVP Report, and the Environmental Sustainability Committee's FY23 Work Plan, and the MVP Core Team is very excited to get started.

For Print engagement, staff will utilize currently available in-house tools to create posters and flyers, which – with the help of a language translation service – will be translated into Mandarin, Spanish, and Hindi (the three primary non-English languages spoken in Town), and specifically tailored to the vulnerable populations served by the Council on Aging and Human Services (COAHS), to describe the purpose of the project and/or intent of the public forum and importance of and expectations for use of community feedback. Posters will be hung up in Town facilities, on Town properties, and in other key locations around Town (i.e., Ferns Country Store), and backpack flyers will be sent home with students from the local public school (K-8) to request feedback and participation from parents. In addition, due to the small population of Carlisle, it is feasible to send direct mailings/postcards to all households in Town. Other assisting print strategies include articles in the Carlisle Mosquito, which is delivered weekly to all residents of Carlisle, and blurbs in the monthly Town Newsletter which can be provided in print if requested. All print materials will contain QR codes and URLs where people can access the digital version of the information and find the online feedback form.

For **Digital** engagement, we will ensure that all public forums specific to the project, and all open public Board/Commission/Committee discussions related to the project can be attended virtually via Zoom. The Town's MVP efforts already has a webpage on the Town website; we will create, maintain and monitor a form on this webpage for submission of digital feedback, and create videos of all project presentations that can be uploaded

to the same webpage. In addition to continued updating of the project webpage, and blurbs in the aforementioned Town Newsletter, other assisting strategies for digital engagement include pushing information out on the Town’s social media platforms: Facebook, Twitter, and Instagram. With the help of a language translation service, all digital content will be translated into Mandarin, Spanish, and Hindi, and specifically tailored to and shared with COAHS priority populations.

For In-Person engagement, the Town will rely primarily on two evening Community Forums at strategic points in the implementation process (see tasks section), and on open, public, advertised evening discussions throughout the process with all relevant and involved Boards, Committees and Commissions. Materials and content presented at the Community Forums will be translated into Mandarin, Japanese, and Hindi, and information discussed at the individual Board, Committee and Commission meetings will be available to be translated upon request. Meeting locations will always be compliant with the Americans with Disabilities Act, safe and welcoming to all, child-friendly, and centrally located. In addition, transportation to the Community Forums will be coordinated for seniors and vulnerable populations via the COAHS Van. Food and refreshments will be provided at the Community Forums.

Other assisting strategies will include advertised drop-in staff hours at Town Hall, and staffed tables at community events such as Route to Sustainability Day (RTSD) in April, and Old Home Day in June. Staff can also attend COAHS luncheons to talk directly with vulnerable populations. [As a side note, the Planning Board and Planning staff are already advertising this potential project – we had a table at Route to Sustainability Day this past Saturday, April 22, 2023, and will plan for similar, if possible, at Old Home Day in June 2023.]

For how community feedback will be incorporated into the project, we will reserve time in our MVP Working Group Meetings to discuss community feedback received at each step of the process and figure out either how to address it or incorporate it into the proposed revisions to local policies, regulations, and bylaws. Feedback received at each open public meeting of a Board, Committee or Commission will be discussed by that Board, Committee or Commission and addressed publicly, and also brought to the full MVP Working Group for discussion, to ensure cross-coordination and integration of ideas.

To guarantee transparency, accountability, and manage expectations of how feedback is being used, we will publish a comprehensive list of comments received and how they were addressed on our project webpage. This list will be able to be translated, if needed.

Public Involvement and Community Engagement Plan Table [Note: items identified in this table should be included in Attachment B as distinct deliverables in order for applications to receive full point values].

Climate Resilient Carlisle Public Involvement and Community Engagement Plan Table Summary (summarized version of narrative)			
	Print	Digital	In-Person
Principal Strategies	Posters around Town and in Town facilities Direct Mailings/Postcards	Video Streaming of Project Presentations Remote Participation for Community Forums & Public Meetings Online Form	Community Forums Public Meetings w/Boards

Assisting Strategies	Articles in Mosquito Blurbs in monthly Town Newsletter (print) Backpack Mailer	Project Webpage Social Media Communication Blurbs in monthly Town Newsletter (digital)	Drop-In Staff Hours @ Town Hall Staffed Tables at Community Events: RTSD, OHD, etc. Staff discussions at COAHS luncheons
Equitable Engagement Modifiers	Translation of Content into 3 languages Specific messaging to resident participants in Council on Aging and Human Services (COAHS) activities	Translation of Content into 3 languages Specific digital project messaging crafted for and shared COAHS priority populations	Forum & Meeting Hours in evenings Translation of Content into 3 languages Providing food/refreshments at Forums Providing transportation to Forums via COAHS Van
<p>How community feedback will be incorporated into project and mechanism by which results will be shared:</p> <p>Reserve time in our MVP Working Group Meetings to discuss community feedback received at each step of the process and figure out either how to address it or incorporate it into the proposed revisions to local policies, regulations, and bylaws.</p> <p>Feedback received at each open public meeting of a Board, Committee or Commission will be discussed by that Board, Committee or Commission and addressed publicly, and brought to the full MVP Working Group for discussion, to ensure cross-coordination and integration of ideas.</p> <p>Publish a comprehensive list of comments received and how they were addressed on our project webpage. This list will be able to be translated, if needed.</p>			

6. PROJECT TRANSFERABILITY, CAPACITY BUILDING, MEASUREMENT OF SUCCESS, AND MAINTENANCE (8 POINTS)

- Up to **2 points** for projects that serve as a demonstration project and are transferable to other communities (i.e., innovative projects that provide deliverables that can be easily adopted by other communities or outline processes that will streamline other similar projects). Please outline what these deliverables are and how they will be shared with other communities.

Carlisle is unique within the immediate region - as a rural town with no infrastructure that is surrounded by more developed towns and located less than 30 miles from Boston – but it is precisely these characteristics that both set it apart from and make it a model for other rural communities. For instance, if this project can help Carlisle continue to manage growth in a smart way that navigates the region’s development pressures without harming its natural and ecological resources, then the process and lessons can be transferred to other rural communities that may also lack infrastructure but not yet be pressured by regional growth patterns and mandates. Not every town needs to be the same – to have the same density or the same amount of open space – or to do things the same way – and preserving Carlisle for the role it plays in the region in a climate resilient forward way may present an innovative case study that can be transferred to other communities.

In addition, communities of any size or character may be interested in applying a similar process to ours – which is outlined herein – to their own community’s efforts to revise policies, regulations, and bylaws. Depending on how we integrate climate resilience best practices into our local documents (throughout or in strategically positioned paragraphs), other communities may want to use our policies, regulations, and bylaws – either entirely or partially – as a model for their own updates.

To the extent that the process and outcomes in Carlisle can be replicated in other communities, Carlisle would be more than willing to partner/participate with the MVP Program on presentations, webinars, creation of model bylaws, speaking engagements, etc. to spread the word.

Deliverables: Process Outline, Achievements & Lessons Learned; Case Study for Rural Community Climate Resilience; Model Policies, Regulations, Bylaws; Presentations/Webinars, etc.

- Up to **2 points** for projects that build community capacity for climate resilience (e.g., fostering social and institutional relationships, integrating climate resilience thinking into other policy or planning projects, training community members on climate resilience and equity, engaging students with climate resilience curricula, etc.).

From a local perspective, one of the major benefits of this project will be the team building, cross-pollination, and continuous inter-disciplinary learning and negotiation that will occur during the process. Traditionally, in Carlisle, staff departments and their respective boards have been somewhat siloed – each looking out for their own interests. While some interests – i.e., housing opportunity and open space preservation – may be ostensibly in competition, there are ways to bridge these interests and create policies that can result in co-beneficial projects while still maintaining the integrity of groundwater and wetland resources. This project will build community capacity for climate resilience by encouraging conversations between staff and boards, and probing the areas of agreement or conflict to see what incremental changes can be made to local policies, regulations, and bylaws. If staff and land use volunteers can agree on what to do, the consultant can help us figure out how to do it based on best practices. To the extent that Town government and Town governance influence broader thinking around Town, a strong and united vision for climate resilience can have a wide-reaching impact throughout the community. Specifically, the MVP Working Group will look to include local youth in the process via the “backpack mailer” and potential internship opportunities to help increase staff capacity with certain aspects of the project.

- Up to **2 points** for how project success will be measured and monitored. Please provide outcomes that can be linked to the project (e.g., reduction in flooding, increase in tree canopy cover, reduced

risk of sewer overflows) and any metrics that the applicant will be able to track to indicate whether or not the project is accomplishing these outcomes over time. The review team is not looking for general statements around the completion of tasks in the scope of work (e.g., “the project is successful if we complete it on time”).

Success during a planning project such as this one will not be measurable in a true hard data way but will be measured by the number of benefits and co-benefits that can be incorporated into local policies, regulations, and bylaws. The goal of this project is not to just update one set of regulations in isolation, but rather to update all land use policies, regulations, and bylaws contemporaneously, and in concert with one another. When conflict points arise, trade-offs will need to be negotiated.

Post-grant, additional measures of success will include:

- *Ease of getting policies, regulations, and bylaws adopted, and whether many revisions are needed to achieve adoption*
- *Use of the new policies, regulations, and bylaws – whether the development community is still interested in and able to propose projects in Carlisle*
- *Tracking of project outcomes via data gathering, ongoing monitoring, evaluation, and analysis*

- **Up to 2 points** for clear description of plans for how any future maintenance needs of or updates to the proposed project would be addressed to ensure the project’s goals continue in the long-term.
 - **For Project Type 1:** Planning, Assessments, Capacity Building, and Regulatory Updates–
 - Describe how the project deliverables will be utilized to continue local resilience work (e.g., regular meetings to track identified plan actions, list anticipated town meeting dates and/or plan to approve updated regulations, how data collection or modeling will support current/scheduled local efforts, etc.)
 - If applicable, how will the plan, assessment, or regulation be updated in the future to make sure it stays current?

The grant proposal herein contemplates consultant assistance with the preparation of revisions to policies, regulations, and bylaws, and with preparation of materials for staff to promote the changes to the various entities that need to adopt them. The final sub-task of the project includes a project hand-off from the consultant to the MVP Working Group, with the whole team strategizing on a schedule for adoption based on a critical path of weighted priorities. Local policies and regulations can typically be adopted in a meeting of a local board, committee, or commission, sometimes with a public hearing, and always with Town Counsel review. Bylaw changes are much more difficult and will require additional outreach and presentations during the lead up to Town Meeting. If this project goes according to schedule, it may be possible to queue up some of the bylaw changes for a fall 2025 Town Meeting (potentially even the May 2025 Town Meeting if the project is ahead of schedule).

While it will be important to update certain local policies, regulations, and bylaws, it will be similarly important not to freeze them in time by being too specific about the climate science and data to be used. Wording will need to be carefully crafted to require certain specifics, but also to allow for evolving science and technology, and to ensure that the Town is able to keep pace with and calibrate based on actual project outcomes. For land use boards and committees to provide reasonable and effective guidance into the future, requirements for data collection, ongoing monitoring, evaluation, and analysis will need to be included in any updates to local policies, regulations, and bylaws, in consideration of staff capacity to understand, analyze, and make recommendations to their boards and committees based on findings that are well-documented and not arbitrary. The MVP Working Group will contemplate a schedule for recurring policy, regulation, and bylaw updates based on an analysis of project outcomes.

8. PROJECT FEASIBILITY, SUPPORT, AND MANAGEMENT (6 POINTS)

- Up to **2 points** for a description of the project team’s technical, financial, and management capacity.

The MVP Core Team members, many of whom will be part of the MVP Working Group if this grant is awarded, comprise decades of technical expertise in planning, conservation, public health, project management, environmental sustainability, public safety, and hazard mitigation. Many of the staff members have worked for the Town for decades and will bring specific, intimate institutional knowledge to this project that will not only help with vetting of ideas and strategies but will also help us navigate potential political and local challenges in getting changes to policies, regulations and bylaws adopted and implemented.

At their meeting on April 18, 2023, the MVP Core Team discussed the timeframe for the grant and considered management capacity and feasibility of completing the project prior to June 30, 2024. Given the relatively limited staff capacity in Carlisle and the heavy historical reliance on volunteers, combined with the desire for robust community engagement and a thoughtful iterative review process, the MVP Core Team agreed that this project will be more successful, and easier to manage vis-à-vis competing priorities, if spread across two years. The grant will be coordinated and managed by Town Planner, Julie Mercier. Julie has worked as a municipal planner in Massachusetts since 2009 and has experience managing grants of different scopes and scales.

The local match will be met via a combination of in-kind staff hours and ARPA funds. If additional funding is needed to complete this project, it could be possible to make a request as part of the FY25 budget.

- Up to **2 points** for letters of support from landowner, public, and/or community partners. There is a place on the online form to upload support letters that have been combined into a single PDF document. Support letters should be submitted in this fashion and not sent in separately.

Letters of Support have been provided by the following interested parties: Carlisle Planning Board, Carlisle Select Board, Carlisle Board of Health, and the Carlisle Environmental Sustainability Committee. The Carlisle Conservation Administrator and Conservation Commission Chair have expressed support for the project, but the Commission does not have another meeting scheduled until the evening of May 4, 2023, and thus they were not able to submit an official letter of support in time for this application.

- Up to **2 points** for good standing in the MVP program – based on timely submittal of progress reports, lack of project extensions, timely correspondence, and compliance with program guidelines, **to be completed by MVP program team.**

End of project narrative. [Note: An additional 10 points will also be allotted based on overall project quality at the discretion of the review committee.]