



# Town of Carlisle Shared Services Study

MAPC Municipal  
Collaboration Department  
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*Smart Growth &  
Regional Collaboration*





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## Introduction

Massachusetts is made up of 351 municipalities, and each one is as unique as the next in terms of the way in which local services are provided. Each municipality has a history as rich as the communities they serve, and decades of local input, budgetary challenges, administrative differences, historical context, and numerous other factors all create a unique set of circumstances that have created the current form of each municipal department and the services they provide. While there is strength in this diversity, as each community has scaled its relative service to serve the distinct demands of its residents, it can also lead to the perception of redundancy and inefficiency when small towns of limited resources are compared to larger departments of neighboring Cities, or the county systems in other areas of the country.

In 2023, the Town of Carlisle was granted a Direct Local Technical Assistance (DLTA) Grant from the Metropolitan Area Planning Council (MAPC) to conduct a Shared Services Study to provide the Town Select Board and Town Administration with information on the types of service areas that can be or are often amenable to sharing with other communities, including examples of successful collaborations in Greater Boston and the types of services already being shared in Carlisle's more immediate region. In October 2023, MAPC formally kicked-off the study by conducting interviews with 14 of the Town's Department leadership staff to gain an understanding of the current service structure, existing regional relationships, and areas of significant need or opportunity for further regional collaboration.

## Executive Summary

The Carlisle Shared Services Study is an introductory look at the Town of Carlisle's municipal services to accomplish two primary goals:

- Document Carlisle's existing service structure, identify existing services sharing, and existing peer department relationships;
- Identify service areas and the benefits of service sharing by providing contextual information on similar local service sharing endeavors; and
- Provide recommendations and initial steps to pursuing service sharing arrangements with neighbors;

This study initially focuses on examining the operation of Carlisle's services. MAPC conducted interviews with each municipal function/department head and asked a series of questions. These questions were intended to provide context and clarity on the unique way in which each department serves its purpose. These questions delve into the operational intricacies, staffing levels, financial dynamics, and inter-municipal relationships of each department, aiming to identify both the strengths and the challenges inherent in their current structures. This approach is designed to uncover potential areas for shared services and regional collaboration, as well as to highlight departments' exemplary functions that could lead shared initiatives with neighboring communities.

The information gathered indicates that although Carlisle's services are delivered in ways distinct from its neighbors, there remain various avenues to explore shared services. Despite the unique procedures and service levels, no service is fundamentally so unique that the sharing of staff or functions is unfeasible. While the distinctive procedure and service level pose challenges to service sharing efforts with its neighbors, no service is so unique that sharing staff or functions is impossible. Overall, while Carlisle is small in stature, the town's ability to deliver satisfactory services while keeping costs minimal is a testament to its commitment to fiscal responsibility and community welfare.



However, the study also highlights areas of concern, particularly in departments operating with minimal staff. This structure can lead to sustainability challenges, as smaller departments can be less resilient to staff turnover and less responsive to periods of heightened demand. Carlisle could significantly benefit from fostering stronger regional relationships at various levels and functions of government with their peers. Such partnerships would not only build the necessary trust for successful shared service agreements in the long-term but also provide a platform for understanding mutual challenges and identifying opportunities for collaboration.

This study outlines many creative ways in which towns of similar size have partnered with their neighboring communities to improve the level of service provided to residents without compromising local control. Carlisle would be well served by learning from these arrangements and applying them to several of their current services. As well as creating a stronger link between the School District to strengthen and improve human resources, information technology, and finance support functions.

In conclusion, while Carlisle's uniqueness is a strength, it also necessitates a strategic approach towards shared services. By prioritizing and nurturing inter-municipal relationships, Carlisle can enhance its service delivery, ensure sustainability, and continue to provide excellent value to its taxpayers. This proactive stance towards shared services will position Carlisle to effectively navigate the evolving landscape of municipal governance and service provision.

## Introduction to Shared Services

It is important to recognize that shared services encompass a wide spectrum of arrangements, varying in scope and scale to suit the specific needs of participating municipalities. These efforts conjure thoughts of large-scale department regionalization and consolidation, but collaborative arrangements can cover all ranges on the spectrum, from entire departments to small support functions. For example, a regional department could manage a comprehensive service like public transportation or waste management across multiple municipalities. On the other end of the spectrum, smaller scope initiatives could involve sharing specialized staff, programs, or resources, such as a shared IT specialist, joint procurement venture, or library programming resources.

The concept of service sharing is often associated with fiscal prudence and promoted as a cost saving endeavor. However, service sharing arrangements are more commonly built organically to address a shared challenge. The most successful shared service endeavors are not a response to budgetary constraints but evolve from a shared understanding of service delivery and challenges. As Carlisle navigates the complexities of modern municipal governance, understanding shared services and how they form will aid in addressing the range of the Town's challenges.

## Shared Service Benefits

It is first critical to understand the motivations of municipalities like Carlisle to join or participate in a shared service. Municipalities choose to share services for a number of compelling reasons, and each may have different reasons for joining the same service. In Massachusetts, each municipality has local control and authority to make decisions to the benefit of their own residents. And each municipality is unique in its administrative structure and service provision. So it is important to understand that participation must benefit all partners, and understanding these motivations can help build alignment and vision. The most frequent motivations for joining and/or initiating a shared service are; addressing shared challenges, improving service delivery, cost efficiency, and strengthening service sustainability.



### *Address Shared Challenges*

Addressing shared challenges is the cornerstone of the shared service model. This collaboration stems from the recognition that municipalities share a similar purpose and the issues that they face are not contained within municipal boundaries. Each municipality maintains their own local decision-making process, so shared solutions need to be beneficial and worthwhile for all involved.

### *Improve Service Delivery*

By pooling resources and building more robust structures or functions, municipalities are often able to provide a higher level of service when compared to individual efforts. For municipal services that are not geographically restricted, the structure of a larger service provides resource advantages to smaller scale departments and services. This can materialize in many ways, including longer service hours, more advanced service provision methods (like expensive and convenient software), and a larger range of services. These improvements are not exclusive to large, shared structures, but can be scaled to impact smaller functions of an individual department.

### *Cost Efficiency*

Many smaller communities are required to provide a minimal level of service in many municipal areas. This can be a large cost burden when compared to larger communities on a cost per/capita basis. Service sharing often requires a significant initial investment of staff time and funding to develop and implement. This often makes this effort cost prohibitive in the short term. However, in areas where economies of scale can be leveraged, the municipal participants can find many cost efficiencies in pooling efforts and serving a larger population.

### *Strengthen Service Sustainability*

In a time where retirements are high and labor shortages are common amongst most municipal functions, shared service models can provide advantages for sustaining municipal services. More robust service structures allow for more formal hierarchy and career progression for staff. They also are able to absorb staff turnover more easily, when compared to departments with a small number of staff.

In conclusion, there are a number of benefits to service sharing, each unique to the municipality and their current delivery of service. While it may take years to enjoy these benefits, if conducted properly, shared services can provide more efficient and a higher level of service to residents. To identify and highlight the potential benefits that Carlisle could gain from service sharing, MAPC placed a considerable emphasis on understanding the staffing and structure of each department, the depth of service provided, and how the process of each department may differ from those provided by peer departments.

## **Shared Service Challenges**

Creating shared services, while beneficial, comes with its own set of challenges. These challenges must be navigated carefully to ensure the success and sustainability of the arrangement. These challenges include building trust between partners, aligning goals and priorities, contracting and governance, and resource allocation.

### *Building Trust Between Partners*

One of the primary challenges in implementing a shared service is building trust amongst partners. Throughout the creation and implementation process, there will be challenges and resistance. Having trust with your partner communities to act in the best interests of all (in addition to their own) and be forthcoming in their intentions is important to determine the appropriate course of action and move forward.



### *Alignment of Goals and Priorities*

As detailed above, service sharing is beneficial because it can address shared challenges. However, each participating community's particular needs may vary based on their current procedures and the varying ways in which they provide existing services. This difference in perspective can create contrasting priorities and misalignment on how to address challenges. It is important early in the conception of a shared service, as well as throughout the implementation process, that participants are aligned in their intentions.

### *Contracting and Governance*

Formal shared service arrangements require a contract or agreement that details key characteristics of the service and its structure. This agreement should cover all aspects of the shared service's structure, scope, the responsibilities of each municipality, funding sources, legal protections, term of agreement, and many other aspects. This must also include a framework for how decisions are made that properly distributes authority amongst the participating communities. Drafting the agreement and gaining approval from all parties requires careful consideration. Once approval at the staff level is gained, each participating community must gain approval of each respective legislative body (Select Board, City Council, or other as defined by each community) in the process outlined under M.G.L Chapter 40 Section 4A. Creating an agreement that is flexible in the beginning, and effective in managing all potential scenarios requires diligent deliberation and patience.

### *Resource Allocation*

Resource allocation in shared services arrangements presents a complex challenge. A delicate balance between fairness, efficiency and satisfaction among partners must be determined in the contracting process. The agreement should also allow for flexibility to manage the fluctuation of resource needs at a given time. Determining resource allocation is much more difficult if the participants haven't built a working relationship or trust.

There are many factors that determine the success of shared services and the likelihood of overcoming these challenges, but none play a more important role than the relationships between the respective staff of participating communities. Service sharing requires advanced collaboration and strong communication between parties, which is easier when existing working relationships have been already established. For this reason, MAPC placed significant emphasis on understanding the existing inter-municipal relationships during the evaluation of each department. In our interviews, we specially asked departments about their current working relationships with their counterparts in other communities, as well as any existing examples of service sharing.

## **Existing Conditions**

MAPC was provided a list of 14 different departments/functions/offices (referred to interchangeably, regardless of official status) with respective internal contacts. Departments were organized into four categories: Finance/Administration; Land Use; Community Services; and Public Safety to facilitate a more focused and effective analysis. MAPC's objective was to gain a foundational understanding of each department, to identify the challenges that Carlisle these departments face, and brainstorm the structures and benefits that could be gained by proactively pursuing shared service arrangements.

This review began with an initial analysis of Carlisle's Annual Report, Master Plan, and FY23 Budget, which provided a high-level overview of each department's services, recent accomplishments, and overall direction. MAPC then conducted interviews with key department staff to gather a more in-depth



understanding of day-to-day operations, recent or recurring operational and/or fiscal challenges, and department staff's existing inter-municipal network.

## Finance/Administration

The Finance and Administration category forms the back-office functions that are responsible for management and operations. This consists of the Assessor's Office, Town Accountant's Office, Town Administrator's Office/Human Resources, and the Treasurer/Tax Collector. Each play a pivotal role in Carlisle's financial management and support all other departments, enabling them to provide residents with requested services. Finance/Administration is also responsible for ensuring the Town of Carlisle functions efficiently and effectively, and that local democratic decisions are reflected in the Town's processes.

### Assessor's Office

The Assessor's Office is responsible for the assessments and evaluations on real property. Staff consists of two full-time employees, including the Assessor and an Assistant Assessor recently hired in March 2023. The Assessor's Office manages a parcel count of over 10,000 properties, almost entirely consisting of single-family homes.

The Assessor reported having relationships with peer departments in Billerica and Concord but noted many surrounding communities have experienced significant turnover. Like many municipal departments, neighboring department vacancies can cause assessors to move from one community to another, which creates short term sustainability issues in service provision and requires peer relationships to be rebuilt once staff are replaced. In this case, Carlisle's neighboring assessors have experience working in Carlisle, and that familiarity can be useful when starting shared partnerships. Other than recent regional staff turnover and compliance with State requirements, there were not any potential regional challenges or rapidly increasing costs reported.

No current formal or informal sharing arrangements exist between Carlisle and neighboring communities, however there is interest in connecting to discuss strategies around existing and new state mandates. Formal shared arrangements may be difficult as neighboring communities, such as Concord, have more parcel diversity and require staff who specialize in either commercial or residential. The Massachusetts Association of Assessing Officers (MAAO) is a professional organization in which participation could lead to stronger relationships and potential opportunities for service sharing.

Examples of regional collaboration in assessor's offices typically include regional procurement for both cyclical re-inspections and software. Like many assessor's offices, Carlisle utilizes an outside service provider to conduct most cyclical reinspection work and is in the process of bringing the Town into compliance with Massachusetts's 10-year reinspection requirement. In this case, Carlisle uses retired assessor who conducts inspections on as as-needed basis and is paid per inspection. The Assessor noted that once the Town is up to compliance the workload will decrease significantly and future reinspection work can be done in house.

### Town Accountant's Office

The Town Accountant is responsible for all invoice and payroll processing, grant and contract management, managing the general ledger, and municipal budgeting. The Department is staffed by the full-time Town Accountant and a part-time Finance Clerk position. The office did not report any specific cost concerns or challenges that may be shared in performing department functions, noting that while the budget could be considered small compared to neighboring departments, they are able to successfully perform their duties.



The Town Accountant reports having informal but developed relationships with other finance departments in the region, including preexisting professional relationships. This network is accessed on an as-needed basis to discuss new regulations or other matters of regional concern. For example, when the American Rescue Plan Act (ARPA) funding was distributed to each community, many finance and administration staff worked together to develop a shared understanding on how to manage the funds. There are several professional organizations, like the Massachusetts Municipal Association (MMA) who provide opportunities for knowledge sharing through a 'list-serve' and many other channels.

The most significant external partnership in Carlisle's Town Account's Office is with the Carlisle Public School District, in which there is potential for expansion. The Accountant's Office assists the Carlisle School District by providing warrant oversight, and payroll assistance.

### Town Administrator's Office/Human Resources

The Town Administrator serves as Carlisle's Chief Administrative Officer and is responsible for implementing the directives and policies set forth by the Select Board, ensuring efficient and effective municipal management. The office is staffed by the Town Administrator, Assistant Town Administrator and an Executive Assistant. The office oversees the day-to-day operations of all town departments, manages all financial operations, and serves as the Chief Procurement Officer. The Assistant Town Administrator in particular serves multiple roles as the head of Human Resources, the liaison to the approximately 50 Town boards and committees, as well as serving as the Communications Manager for Carlisle, managing the Town's social media accounts and creating a monthly newsletter.

The Town Administrator's Office plays a pivotal role in the success of any shared service initiative in Carlisle. As the overseer of town departments and staff, the Town Administrator's office is responsible for ensuring that each effort aligns with the town's goals and policies. The office also bears responsibility for the legal review of all documents and agreements, safeguarding Carlisle's financial and resident's interests, and mitigating any potential liability. The Town Administrator's Office is instrumental in navigating the approval process for shared service arrangements, as the process often requires formal approval from the Select Board (as outlined in Massachusetts General Law Chapter 40 Section 4A).

Beyond the internal navigation of shared services and the representation of Carlisle's interest, Town Administration should also be proactive in fostering positive inter-municipal relationships with neighboring community administration, as a high-level of trust, communication, and mutual understanding is instrumental beneficial at inception, implementation, and oversight of any shared service arrangement. These relationships can also be built through semi-frequent check-ins with peers and through participation in organizations like MMA and the International City/County Management Association (ICMA). Also, as the Town Administrator's Office also serves as Carlisle's Chief Procurement Officer, the Massachusetts Association of Public Purchasing Officials (MAPPO) is an active organization that often shares procurement resources and strategies that can lead to improved procurement effectiveness and joint procurements. While shared staffing and service efforts often start at the municipal department level, successful endeavors require the consent of Town Administration and can begin when the priorities of neighboring town administration align.

The most significant external relationship under the purview of Human Resources is with the Carlisle Public School District. The Assistant Town Administrator currently performs some Human Resources tasks for the District, which has had an increase in need for staffing services. It was noted that both the Town and the District have expressed interest in expanding this collaboration and have room for improvement in embracing digital tools in the staff onboarding process.



## Treasurer/Tax Collector

The Treasurer is responsible for bills, liens, and responding to questions from residents and from legal and real estate professionals. The Treasurer works closely with the Town Accountant and Assessor's Office, and interfaces regularly with all other departments as they receive money turned over from those departments. The office is staffed by the full-time Treasurer/Collector, a full-time Assistant and a part-time staff member.

Tax collection is not a function in municipal government that has a long history or precedent of service sharing. Costs are relatively consistent year over year, with the exception of increases in postage, as one of the core functions of the Department is to mail bills to residents. It was noted that hiring for this office's open positions can be difficult and positions are often combined with other finance or clerical functions to make the position more attractive to candidates.

The current Treasurer was hired within the last 18 months and is working to build relationships with neighboring communities. These relationships can be fostered through active participation in MMA, as noted above, but also through the Massachusetts Government Finance Officers Association (MGFOA). A potential area of shared challenges is working with the Town's Enterprise Resources Planning (ERP) software, Munis. There are many local communities that use Munis, and while joint procurement is not an option that yields positive results due to Munis's advanced market share and the barrier for switching ERP software, some towns have shared Munis expertise via external contract or through shared staffing agreements. Carlisle recently underwent a major ERP upgrade and their experience, as well as the experience of others, provides an opportunity for knowledge sharing.

## Building and Land Use

The Building and Land Use category is comprised of the departments responsible for zoning, building and other code enforcement, and permitting. This includes land use planning, administration of conservation lands, and other protected or special use areas. The Building Commissioner's Office, the Town Planner's Office, the Conservation Administrator's Office, and to a large degree, Public Health, perform these functions in Carlisle.

### Building Commissioner's Office

The Building Commissioner's Office principally provides inspection and permitting services for Carlisle. Staffed by a full-time Building Commissioner, this office is responsible for performing all building inspections. Specialty trade inspections, like plumbing, gas, electrical are performed by part-time inspectors. In 2022, the Department performed 458 building inspections, 399 electrical inspections, 185 plumbing inspections, and 163 gas inspections. It issued 287 building permits, 305 electrical permits, 129 plumbing permits, and 135 gas permits. The Department budgets for a part-time administrative position, but as of early December 2023 this position was vacant. This administrative position was redeveloped to include sustainability coordination work for the Town.

The Building Commissioner and administrative assistant perform all of the administrative permit and scheduling for the part-time inspectors, and the office reported the ability to keep pace with demand. The Department credits the efficiency and effectiveness of the Permit Pro software system with allowing it to function effectively with a lean staff.

While not an immediate issue, qualified building commissioners and inspectors have become rarer, as have qualified inspectors, particularly for plumbing, and Carlisle has been approached by neighboring



communities about exploring the potential of sharing a building commissioner in the future, a model that has been adopted in other towns such as Hamilton and Wenham.

### Town Planner's Office

The Town Planner position was established with the adoption of the Master Plan in May 2022, and is charged with managing the implementation of the Master Plan, implementing the 3-year Geographic Information Systems (GIS) Strategic Plan, assisting the Town Administrator with compiling data and developing analysis to present to the Select Board. The Town Planner is also responsible for staffing various boards and committees, development administration (including tracking documentation through the development and construction process), and grant writing and management. As a new position, staff has been working to standardize elements of the development process and procedure, as well as other elements of planning and land use functions that were previously addressed in a more ad hoc manner and form a central repository of all planning related information and records.

The Town Planner is developing relationships with peer communities through participation in regional planning collaboratives such as the Minuteman Advisory Group on Interlocal Coordination (MAGIC), as well as connecting with other communities in the region that have similar needs and challenges, such as those without traditional water and sewer infrastructure, and those that have two or more-acre zoning. As an MBTA adjacent small town, the Town Planner is also conducting research and gathering data to inform how Carlisle intends to comply with M.G.L. Chapter 3A.

While the Town Planner works to professionalize the planning policies and improve the functionality of the office, it is important to think about the Town's needs and the resources around that can help provide the appropriate level of service. The Town is implementing a GIS system, but like most small communities, Carlisle does not have the necessary volume for a full-time GIS position. This is an opportunity to approach neighbors or other small towns of similar size. There is potential for partners that are not geographically close to Carlisle as modern technology has created opportunities to access the necessary resources for this position off-site. Another opportunity for collaboration is participating in Regional/Shared Housing Services Office (RHSO or SHSO), which is described in more detail in the *Shared Services in the Region* Section below.

### Conservation Administrator's Office

The Conservation Administrator's Office, which consists of one full-time Conservation Administrator and full-time assistant, assists the Conservation Commission in its obligations to protect wetland resources and manage over 11,000 acres of conservation land in Carlisle. In this work, the Department commonly receives wetland filings that require input from other departments and boards including Public Works, the Planning Board, and the Board of Health. The office collaborates closely with the Conservation Restriction Advisory, Stewardship, and Trails Committees on matters involving conservation easements and trails on conservation lands. The Department also enrolls farmers for agricultural uses on conservation lands, enforces provisions of the Wetlands Protection Act, assists private property owners filing with the Conservation Commission, and works with the Cranberry Bog subcommittee on the future of that land.

The Department major costs are staffing, as well as maintenance and landscaping costs. While costs have remained steady, it was noted that additional funds will likely be needed to complete necessary maintenance work on the Town's Cranberry Bog property. While the Department closely collaborates with other departments and entities within Carlisle, staff have noted the limitations to regional collaboration due to strict state requirements with matters relating to Town-owned conservation lands, wetlands, and resources.



## Public Health

The Carlisle Public Health Department provides a range of services that begin with its permitting and inspectional services that cover food, hazardous waste, septic, well, camps, animals, and others. In addition, the department maintains resident health programs like vaccination clinics, infectious disease control, insect- and tick-borne illnesses, and manages Emergency Preparedness functions for the Town. The Department consists of a Full-Time Health Agent, a 30 hour per week assistant position, and a part-time Public Health Nurse.

The Department maintains very strong regional relationships, most significantly through the Great Meadows Public Health Collaborative, which is highlighted below in the *Shared Services in the Region Section*. Carlisle is also part of the 12-town Central Middlesex Medical Reserve Corps, and participates in the Public Health Emergency Preparedness (PHEP) Coalition Region 4AB.

Some of the larger challenges facing the department come in the wake of the COVID-19 pandemic. The responsibilities and expectations for public health as a government function have become the subject of close examination from the Commonwealth of Massachusetts Department of Public Health (MDPH). While there has been a significant amount of funding allocated to public health for regional capacity building, MDPH is phasing-in intensified oversight of current statutory municipal requirements, including reporting inspectional data and frequency of inspections, workforce credentialing, and training requirements. The increase of funding and added layer of regional public health positions has contributed to an industry wide shortage of staff started by pandemic cause burnout. This may cause issues in filling positions if retirement.

## Community Services

This category encompasses all of the Town's departments which provide non-emergency community services for the residents of Carlisle. The Gleason Public Library, Recreation Department, and the Council on Aging and Human Services provide the majority of these services in Carlisle. These public-facing services are critically important not just because of the benefit they provide, but because they are the departments that an average Carlisle resident is most likely to interact with on a regular basis and with which they will be most familiar.

### Public Library

The Gleason Public Library is open 6 days a week, including 4 evenings, providing the most hours of public access among the community service departments. The library provides traditional library book and DVD lending services, electronic resources such as e-books and audiobooks, access to public computers, printer, and a Library of Things, as well as providing a variety of programming such as story times, summer reading, book clubs, art exhibits, and other community activities for residents of all ages. Additionally, as one of the relatively few open public buildings in Carlisle, the Library serves as a community space for residents of all ages, from students to seniors.

The Library Department collaborates with the Recreation Department and COAHS to increase participation and reach of the community service programs available to residents, and also collaborates somewhat informally but regularly with neighboring libraries for certain online programs, such as classes over Zoom. The library is a member of the Merrimack Valley Library Consortium (M VLC), which is highlighted in the *Shared Services in the Region Section* below.

State requirements mandate that at least 15% of the library's budget be spent on new materials, thus tying any rising staff-related expenses to a proportional increase in acquisition costs. Staff has reported



that while personnel expenses have been manageable and pay remains competitive, there is significant turnover among the part-time staff which could potentially be reduced through consolidating some of the roughly 10 part-time positions.

### Recreation Department

The Recreation Department provides a wide variety of programming for residents of all ages, including programs related to health, sports, science, arts and crafts, and a preschool. These programs are held at the recreation center in the old school building, at town hall, the Banta Davis Recreation Area, Spalding Field, the Town Tennis Courts, and at facilities at the Carlisle Public School.

This one-person department is subject to the potential need for staff backfilling or having an additional staff member who could cover classes if the Director is out for a period of time. The most significant Department cost is field maintenance, which is a contracted service. The Director noted that this year was a somewhat anomalous year with an increased maintenance cost due to the amount of rain.

The Department reports having strong existing relationships with the Library, COAHS, and with neighboring recreation departments. These relationships include collaborating on grants for joint program funding and events with the Library and COAHS, as well as coordinating between the three departments on programming to ensure maximum participation and minimum duplication of services. The Department also coordinates and shares programming and facilities with neighboring communities, as highlighted in the *Shared Services in the Region Section* below.

### Council on Aging and Human Services Office

Carlisle's Council on Aging and Human Services Office (COAHS) provides a variety of social services, programs, and transportation services for Carlisle's senior residents. Social services include meeting with residents in need of fuel and nutrition assistance, snow shoveling assistance, housing or assisted living, or social program information. COAHS also provides programming that includes meals, Veterans' programs, support groups, and other cultural programs. The Office is responsible for provided the Town's American with Disabilities Act (ADA) transit program and has 2 vans and an SUV for transportation services to medical appointments, shopping and social functions, as well as providing occasional transportation to Boston. The Office also partners with the Minuteman Senior Services as detailed below in the *Shared Services in the Region Section* below.

Carlisle lacks a dedicated senior center, with programs being held in other Town community spaces, or at local churches. This lack of a central space for both formal activities and informal socializing is a challenge that Carlisle's senior programs face relative to many neighboring towns, and limits the COAHS in terms of the services it can provide. The Office reported that the most significant rising costs were for transportation-though much of this was due to upfront training costs for new drivers-and programmatic costs.

The Department is working to build relationships with neighboring COAHS departments and do occasionally share programs, particularly virtual programs, with neighboring towns. The COAHS Director also meets regularly with counterparts in the region to discuss challenges, program and service updates, and other items of common concern, including a monthly meeting with Minuteman Senior Services.

### Public Safety

The Public Safety category focuses on emergency services, and includes Police, Fire, Emergency Medical Response services, as well as Dispatch. By their nature these services are the most urgently critical of those



provided by the Town, and there are a number of factors that set Carlisle apart from neighboring communities in how these services are provided. The residents of Carlisle have come to expect a very high level of service from their emergency response services, and MAPC is mindful of the desire among residents and staff to prioritize maintaining this level and quality of service.

### Fire Department

The most unique aspect of Carlisle's Emergency Services is its On-Call Fire Department. This model, which the Town maintained for 95 years, relies on the participation of residents in joining the Department as part-time employees. The Department has about forty-five part-time employees, over twenty of whom are certified EMTs. The Fire Chief is the only full-time in the Department. This unique structure provides a number of benefits to residents, including a very low cost per capita, as payroll and benefits expense are greatly reduced when compared to full-time departments. The structure also allows for large-scale responses to large structure fires, as it allows for many firefighters and engines to be dispatched very quickly. This also has the effect of reducing the need for mutual aid in these situations.

Due to the rural water supply, the Department has specialized vehicles, equipment, and expertise in drafting water which also distinguishes it from surrounding Fire services. The Department also runs two ambulances and, despite exclusively using part-time on-call EMTs maintains fast response times, with no call on record ever taking more than 12 minutes.

While the current model provides a very high value to taxpayers, it is dependent upon continued participation from residents, including younger residents. Currently the department is made up largely of older professionals, and it is typical for younger members to gain experience in Carlisle before leaving for full-time employment elsewhere. The Department noted that a current station would not be able to support a full-time staff if Carlisle desired to move to that model of service.

### Police Department

Carlisle's Police Department is responsible for enforcing local, state, and federal laws and ensuring the public's safety within the community. The Police Department currently has 12 full-time officers, 8 part-time officers, 3 traffic officers, and one part-time administrative position, with a minimum of 2 officers per shift. In addition to traditional emergency response, the Police Department prides itself on having a strong community-service focus in its department functions, by responding to many non-traditional calls for service. This includes services call like helping senior residents with strenuous tasks and performing property checks for residents out-of-town for extended periods of time.

The Department maintains a number of strong regional partnerships, including membership in the North-Eastern Massachusetts Law Enforcement Council (NEMLEC), which includes over 50 municipalities and provides mutual aid for SWAT operations, crisis response, and K-9 units. The Department is also a partner in the Middlesex County Mutual Aid Agreement that provides additional support with K-9 units, Rapid Response teams, motorcycle units, and school threat assessments. Additional existing partnerships include a shared clinician with two neighboring communities. The department also shares the responsibility of covering the Concord-Carlisle High School with the Concord Police Department.

### Dispatch

Dispatch is Carlisle's only 24/7 call service for the Town, responding to 911, Police, Fire, or EMS initiated calls. Carlisle Dispatch will also receive and initiate response to Department of Public Works issues, school calls, and take walk-ins as well. Dispatch has 5 full-time dispatchers, with at least one dispatcher on duty at all times, with two doubled shifts per week, which is when the manager performs administrative duties. All of the dispatch staff are highly experienced, and most have been with Carlisle for many years. As with



the other public safety departments, Dispatch prides itself on its accessible, community-oriented approach to service delivery, including taking many nontraditional calls for service including nonemergency aid for senior residents, and dealing with unusual animal issues that arise.

Wages and associated personnel costs account for approximately 70% of the budget, with line items such as training being supported by state grant funding. The department noted challenges in finding appropriate and available grants, and that they would like to apply for more and would benefit from more resources to locate such grants. Additionally, Dispatch faces industry-wide challenges with recruitment and retention that may impact Carlisle as the current staff ages and eventually retires.

Dispatch has strong relationships with surrounding communities, including mutual aid agreements, and cross-monitoring of dispatch channels between communities. The department expressed a desire to further formalize these relationships through a more regular regional conference or other gathering of dispatchers.

## Shared Services in the Region

### Existing Partnerships

Through these department overviews, many staff identified shared service arrangements in which Carlisle already participates. Some of which pre-date most, if not all, existing staff and are easy to overlook. This network of existing partnerships and shared initiatives provide a range of services that both support existing departments and enhance service delivery. By taking a closer look at these existing partnerships, we gain insight into the process in which these services were developed.

#### *Merrimack Valley Library Consortium*

The Merrimack Valley Library Consortium (MVLC) represents one of the most robust and long-standing shared services models in the region. The consortium was first formed as a response to the need for cost-efficient electronic check-in/out management in the late 1980s. Smaller communities were not able to afford the software and infrastructure to update so communities came together to initiate a bulk purchase to greatly reduce the costs for all participants.

Since 1988 when the consortium was formally incorporated, it has grown to respond to more community needs. MVLC provides many IT related services, including the Integrated Library System (ILS) which allows each of the libraries in-network to scan the availability of certain resources at any participating library. The Consortium also provides professional development support. The Consortium currently has 10 full-time staff members and serves a Library workforce of over 800 across its 36 communities. Merrimack Valley and its 36 libraries are not alone in their participation in a Library Consortium, as each Massachusetts community is represented by a library consortium, each of which provides similar but different services to their respective members.

The MVLC is an independent non-profit 501c3; however, each of the participating communities are represented on the MVLC's governance board and are able to attend monthly meetings to engage in long-term planning and make strategic decisions on the direction of the Consortium. Local assessments are based on a formula that estimates the demand for service. This includes datapoints that the ILS system collects, like annual circulation. The Consortium also provides optional a la carte services.

Despite the creation of this shared service dating back over 35 years, this is a good example of multiple municipal entities identifying a shared need and coming together to lower costs. In the beginning, the



Consortium started with a small purchase. Over the course of the last 35 years, the Consortium has built upon its services best and slowly expanded to more service areas available to each library. When determining the right shared service endeavor, it can be difficult to see past the initial challenges of implementation in the first few years. This Consortium and the model established by the Massachusetts Library System are a testament to what can be accomplished over several decades.

### *Minuteman Senior Services*

Minuteman Senior Services is the designated Area Agency on Aging (AAA) under the Older Americans Act, as well as the state-designated Aging Services Access Point (ASAP) for the Minuteman region, serving 16 communities from Arlington to Stow. Every Town in the Commonwealth has an equivalent AAA and ASAP, with variable funding depending on the size and number of communities served. The agency is funded through a combination of federal and state sources, and provides a wide variety of services for seniors, though these services are often strictly defined per the federal and state funding sources. The agency offers about 20 total programs, the largest of which is their homecare program. Care managers go out to residents and perform assessments for in-home services, which are contracted out to vendor agencies, and financial assistance is offered to eligible residents based on financial need.

The Agency also partners with Towns to administer the Meals on Wheels program, which are delivered each day and include medically tailored meals. Those delivering the meals document any change of conditions of the recipients or other safety issues that warrant connection to further care services or reaching out to emergency contacts.

Additional services include adult protective services checks from social workers who investigate, and report as needed, financial education programs, and SHINE Counselors connected to each COAHS who provide free information on healthcare eligibility, prescription benefit plans, and related medical care resources.

Minuteman staffs about seventy Full-Time Equivalent (FTEs) but relies heavily on its over four-hundred volunteers to support all of their programs and services. Without a community center of their own, Minuteman relies on community senior centers or other facilities for non-home-bound programs.

The agency relies heavily on COAHS partners to reach residents and provide information, as they have the most direct familiarity with residents and their needs. The Minuteman director meets monthly with the COAHS directors in the region, providing updates on new programs and connecting on issues of regional concern. These partnerships and broad swath of programming provide a strong foundation for further programmatic partnerships between Carlisle and its neighbors, particularly given Carlisle's lack of a dedicated senior center.

### *Great Meadows Public Health Collaborative*

The Great Meadows Public Health Collaborative (GMPHC) is a regional public health entity established through the Commonwealth of Massachusetts' Public Health Excellence (PHE) grant program. The (PHE) grant program, established in 2020 supports the establishment of inter-municipal shared service agreements to build public health capacity. Carlisle is one of the seven participating communities (Bedford, Concord, Lincoln, Sudbury, Wayland, and Weston) in the GMPHC, operated by the lead community of Sudbury.

Through the funding provided by the PHE grant, the Town of Sudbury directly staffs one full-time Shared Services Coordinator, one full-time Health Inspector, a part-time Public Health Nurse, and is in the process of hiring another regional Health Inspector and one part-time health Communications Specialist. The collaboration between these communities also led to the successful application to the Massachusetts Community Tracing Collaborative grant program, that has enabled the Town of Wayland to hire three



more staff members including a Coordinator, a full-time Epidemiologist, and a full-time Public Health Nurse.

This GMPHC provides Carlisle access to a number of public health services. This includes health inspections on request and inspectional training resources. The GMPHC also provides staff backfilling services for long- or short-term coverage in any event. The Collaborative has enabled Carlisle to access several advanced health programs like Hidden in Plain Sight, which helps residents identify early signs of substance use and flag the appropriate social and health services, access to and training for Narcan in the event of an accidental overdose, and access to a tick-borne disease testing program. The Case Tracing Collaborative provides coverage for the Massachusetts Virtual Epidemiological Network (MAVEN), which reports, tracks, and surveys over 90 infectious diseases, including COVID-19, Influenza, Hepatitis, tick-borne diseases, and Tuberculosis. This program greatly enhances Carlisle's ability to respond to any detected infectious disease.

The development of the GMPHC and Case Tracing Collaborative was catalyzed by the State grant programs, but this process was aided by the well-established relationships of the health directors/agents. The directors/agents had strengthened their inter-municipal network through the frantic environment presented by the COVID-19 pandemic when each were dealing with a rapidly changing and emergency. These relationships made obtaining alignment for the objectives of the Collaborative a much simpler process and allowed for quick implementation of the various programs. While this shared model is made possible by the large amount of external funding, many other PHE groups have struggled to build as robust a service without the established relationships and alignment between the participating community staff.

### *Recreation Department Informal Program Sharing*

Among the Departments interviewed for this study, many had more formalized partnerships with neighboring communities as discussed above, however, the Recreation Department stood out in developing informal program sharing with neighboring recreation departments. These programs include shared archery classes with Weston and Concord, and other shared classes with Acton and Bedford, in which locations and facilities are alternated between the participating communities. The cost of the instructor and supplies are split between the communities.

These informal partnerships are worth highlighting because in addition to the benefits they provide directly, they can be imperative to building trust and creating functional relationships from the ground up. Finding a common need or other initial area for collaboration is the first step, no matter how small it may seem. From there, informal partnerships can develop, with a very limited sharing of resources, whether that be staff time, facilities, or materials. This sharing will likely begin with low-risk opportunities, as exemplified by the shared Recreation classes, or the shared virtual programming through the Library and COAHS. Many, if not most, of the Town departments have areas of opportunity to build and expand informal programs or partnerships with more communities in the region, and we believe pursuing these opportunities present some of the most promising next steps in developing effective shared service arrangements in the long-term.

### *Other*

While the services highlighted above were selected because of the relevance to Carlisle's current situation, it is important to note the other inter-municipal sharing that might go unnoticed otherwise. There is a robust history of inter-municipal partnerships in almost all emergency response functions. Each neighboring community's emergency operations staff and plans are greatly intertwined, and Carlisle is aided by the strong mutual aid network built through planning and practice of Police, Fire, and EMS services. These networks are growing as efforts to expand emergency response through other federal grant programs



like the Public Health Emergency Preparedness (PHEP) program organized through the Health and Medical Coordinating Coalitions (HMCC).

Carlisle has also hired shared positions in the recent past. This includes a Sustainability Coordinator who was shared with the Town of Westford. While a temporary grant funded position, this position played a central role in standing up the newly created Environmental Sustainability Committee and laid important groundwork for the Town to address many of the priorities set forth in the Master Plan. At the time of writing, Carlisle is exploring options for building staff capacity to continue this work. This type of partnership is an example of a strong opportunity to continue building an intermunicipal partnership around a core of common priorities.

## **Other Local Shared Services**

### *North Shore Regional IT Collaborative*

The North Shore Regional IT Collaborative (NSIT) is a shared service arrangement between the communities of Danvers, Essex, Hamilton, Wenham, Topsfield, Manchester-by-the-Sea, and Middleton. The intent of this Collaborative was to leverage the robust staff capacity and knowledge of the Danvers IT Department to assist each of the communities with their shared IT challenges.

In 2019, the communities were awarded a Community Compact Cabinet Best Practices Grant for a feasibility study of regional municipal IT. This study cataloged the challenges that the communities faced and outlined the opportunities they could leverage to address them collectively. Through a Direct Local Technical Assistance Grant (DLTA), the communities utilized MAPC as a neutral mediator to assist with consensus building and to draft an agreement. The communities formally established the Collaborative in July 2021 with a flexible Memorandum of Understanding and a local contribution of roughly \$4,000 per community. This contribution allowed Danvers to backfill existing staff and freed its director to prioritize addressing the shared challenges of all Collaborative participants.

The Collaborative's initial focus was to standardize and improve the community's cybersecurity infrastructure. Subsidized through a State grant, the communities were able to purchase and implement a multi-tenant suite of hardware and software throughout the seven communities. This system features email protection, multi-factor authentication, endpoint detection and response, and many other security features. This enhanced cyber posture also perfectly aligned with the new Massachusetts Interlocal Insurance Association's expanded insurance requirements, which allowed each community to significantly reduce the participating community's exposure to liability. The procurement and implementation of this service was completely managed by the Danvers IT department, while each community retained local control on the timing of installation. The communities are also in the process of building a regional fiber network to link all participating communities and allow Danvers to establish a regional data center, which significantly reduces the capital expenses of participating communities.

The Collaborative also recently executed a shared staffing agreement with the Town of Middleton. Rather than hire an IT project manager directly, Middleton entered into an Inter-Municipal Agreement with Danvers to hire another staff member that is specifically tasked to work in Middleton. Instead of being the one-of-one IT staff in Middleton, this staff member is a part of the Danvers IT department hierarchy and managed by professional IT staff. This arrangement gives Middleton enhanced access to all Danvers's IT resources, with a dedicated liaison. In the first year of this arrangement, all sides have reported favorably. Middleton has professional IT staff to manage the day-to-day and long term planning of their IT infrastructure, and Danvers now has a direct line into managing Middleton's assets as if they were their own.



One of the largest benefits for participating communities when compared to other similar communities, is access to subject matter experts who do not have a vested interest in the outcome. Carlisle, like many other small communities, contracts out their IT support. Without on-staff IT experts with intimate knowledge of their infrastructure and situation, it is difficult to move forward with long-term infrastructure planning and projects confidently.

The North Shore Regional IT Collaborative is a product of high-level relationships and trust between the administrative staff in the participating communities. All are in alignment with the Collaborative's goals and accept the shared service model as an extension of their own staff and enhancement of the level of service they enjoy. The participating communities benefit by having access to The Danvers IT department has grown its purchasing power to leverage more favorable rates and become a magnate for grant funding. Across the board the level of service and protection is greatly enhanced by this partnership.

Another key factor is that Danvers has a supportive ally in their administration who enabled and advocated for his staff to take on the larger challenges of managing multiple towns and their IT projects. For many communities, this level of enhanced sharing and responsibility could be met with hesitation. But Danvers Town Administration was supportive of this endeavor and coordinated all necessary approvals.

### *The North Shore Regional 911 Dispatch Center*

In recent years, the Commonwealth has invested significant resources to promote and subsidize the regionalization of emergency dispatch services throughout the state. The State 911 Department provides grants and expertise to support these efforts, and directly oversees several regional dispatch centers. While many who have attempted to initiate these services have encountered significant challenges, existing regional dispatch centers, such as North Shore Dispatch, can provide quality service while also providing the opportunity for cost savings for communities. North Shore Dispatch is entirely funded by state appropriations, and while they encountered the same long and challenging process to refine their practice, their service is now established and functional. Furthermore, as many communities throughout the state are exploring the transition toward a regional model, there are established policies and practices that simplify the process of joining a regional dispatch center.

The North Shore Dispatch Center began under the Essex County Sheriff in 2013 and has been under the direct oversight of the State 911 Department since 2019. The regional dispatch currently services six towns: Amesbury, Essex, Manchester-By-The-Sea, Wenham, Topsfield, and Middleton, with North Adams having voted to join shortly. The process to join is started by submitting a letter of intent. Once submitted, the North Shore Dispatch then conducts a feasibility study, collecting data on the Town's current Dispatch calls, staffing, and service, then present the expected costs and findings to State leadership, and then to the respective community for consideration. If approved by both parties, the community will execute the Inter-Municipal Agreement, which is a five-to-six-year contract. In considering incorporating new towns, North Shore Dispatch must balance existing capacity considerations, including efforts to reduce the number of frequencies that dispatchers must monitor at a given time by working toward common frequencies.

Regionalizing dispatch service necessitates a certain level of standardization and synchronicity between peer departments in the region, and to the extent possible such standardization of resources, staffing models, and service structure is encouraged. Nevertheless, North Shore Dispatch reported that they often accommodate town-specific needs and service structures when onboarding a new community. This has included serving a wide variety of fire department structures and service models, and town-by-town procedures for animal control and automobile accident response.



To onboard a new community, the North Shore Dispatch Center emphasized the importance of having a very invested staff, particularly the Police and Fire chiefs and town leadership in order to successfully integrate into the service. In the case of the North Shore Dispatch Center, the service is entirely funded through state appropriations, so it is very attractive to communities looking to shrink their budgets. However, it was noted that that is the primary reason a community wishes to join, the effort will fail.

All regional dispatch centers recognize that all options have trade-offs that must be weighed carefully. In Carlisle, the Dispatch team is very experienced and has a high level of familiarity with their community and the officers that serve. However, Carlisle is not immune from the industry-wide shortage of qualified career dispatchers, and eventually issues of the long-term health and sustainability of the service may need to be addressed. While Carlisle is likely out of the service area of the North Shore Dispatch Center, it is important to consider all options and build the necessary relationships and ground work to keep regional options feasible.

### *Hamilton/Wenham Shared Building Commissioner*

In the world of shared municipal services there are few local communities that have committed to the concept as much as the Towns of Hamilton and Wenham. The two communities have a long history of pursuing joint ventures together, dating back decades. In June 2009 the Massachusetts Division of Local Services published a comprehensive study on the total regionalization and merger of the two municipalities. This study was never implemented, however, both Hamilton and Wenham have been willing partners to explore innovative shared service arrangements.

To date, Hamilton and Wenham have created shared staffing arrangements for the assessor's office, regionalized their library system, recreation efforts, and a shared Building Commissioner. They are also both participants of the Eastern Essex Regional Public Health Coalition PHE collaborative, the North Shore IT Collaborative, and share a regional school district. This history of sharing services has transcended multiple Town Administrators and Select Board representatives, and they continue to refine and build upon their shared service arrangements.

While they share many notable accomplishments, it is important to highlight their shared Building Commissioner's Office. In 2016, the communities identified that their current building office structures and fully part-time staff were not able to keep up with the demand for service. While both communities did not feel like they had the capacity for full-time staff, they felt that there was a more organized and formal arrangement that could be implemented to provide a higher level of service.

In 2017, the communities began organizing their priorities and began conversations about a shared service structure. Both communities identified that any shift in point of service was unacceptable. As much as shared services are administrative efforts, both acknowledge the political factor of regional efforts and regionalization was a political non-starter. Both offices would need to remain open full time and be able to process permit requests and other business.

The communities adopted a structure that allowed for the point of service structure to remain intact, while sharing the Building Commissioner and other inspectional staff. By retaining their own admin/clerical staff, and their own providing office space and permitting software, they could keep their offices open to process permits and conduct normal business. Like Carlisle, the admin and clerical staff had other inter-departmental responsibilities, but both towns coordinated inspectional schedules with the shared staff.

This change in service model allowed the communities to pursue a higher caliber of candidates seeking full-time employment and also enhance their ability for zoning enforcement, a function that both communities



identified needed improvement. By using a short-term Inter-Municipal Agreement, they were able to consistently revisit the agreement and ensure that the service was working appropriately.

### *Regional Housing Services Offices*

Massachusetts municipalities are expected to provide a range of housing services, including the management of affordable housing stock, ensuring compliance with housing regulations, and many other specialized housing functions. However, the capacity to fulfill these obligations can vary greatly between communities. Larger municipalities often employ dedicated staff with expertise in these functions and are well equipped to meet the state mandated requirements under M.G.L. Chapter 40B and Chapter 40 Section 3A among others.

Over the last decade, many municipalities have been coming together to outsource these housing tasks to private companies using a Regional Housing Services Office (RHSO) or Shared Housing Services Offices (SHSO). To date, there are four collaborative housing services offices within the MAPC region, serving twenty-four communities. This includes the RHSO operating out of Concord, serving Acton, Bedford, Burlington, Lexington, Sudbury, Wayland, and Weston. Each shared office operates slightly different, both in terms of the services provided, fee structure, and staffing approaches. It is Carlisle's best interest to evaluate the RHSO services and associated fees and determine if it is advantageous to participate.

## **Recommendations**

The information gathered highlighted several distinct aspects of Carlisle, each influencing potential shared staff discussion. While Carlisle's charm and unique character make it a very desirable place to live, its status as a nearly entirely residential town, over 11,000 acres of conservation land, unique on-call Fire Department, absence of water and sewer infrastructure, amongst other features, set it apart from all of its contiguous neighbors. However, Carlisle still has many options and MAPC recommends the following steps to help build more options for service delivery.

### **Prioritize Building Intermunicipal Networks at all Staff Levels**

The importance of a strong intermunicipal network has been thematic across all types of service sharing arrangements. MAPC has identified many existing intermunicipal partnerships of varying degrees of formality across Carlisle's departments. Some of these are facilitated in part by regional entities such as MVLC or Minuteman Senior Services, while others come in the form of more ad hoc program sharing, or simply regular communication about software issues or the impacts of new state regulations or mandates. There are also several professional organizations as noted above that can help build networks and start shared services conversations.

While this study has focused on the role of department leadership, these networks can and should be built by staff and officials at all levels of the Town government. Elected Board members with relationships with their counterparts in other towns should leverage those to find potential fruitful partnerships or areas for discussion. Meanwhile, Department staff with technical or programmatic expertise are often best positioned to reach out to their neighboring counterparts to discuss specific challenges or ideas for collaborative improvements.

### **Pursue Strategies to Address Single Points of Failure/Backfilling**

One of the recurring themes consistent throughout staff interviews is the inherent challenge of operating departments where a single staff member, often the Director, is the sole employee able to perform an important function. To take vacations, those staff members often require weeks of planning and



preparation, and municipal service delivery is severely impacted during those times. This process does not account for the sudden need for a longer leave of absence, staff turnover, or other disruptions to each department's ability to perform its tasks and key municipal functions.

As noted above, the Public Health Department was able to build regional redundancy through the Great Meadows Public Health Coalition. While this regional collaboration is entirely funded by the Commonwealth of Massachusetts through the Public Health Excellence grant program, this is an excellent example of the type of backfilling arrangements that can build service resilience. Carlisle should continue to identify departments with single points of failure and approach their inter-municipal networks to share these challenges. Shared service arrangements can often start from these conversations. While it is challenging to replicate the robust level of service provided by Great Meadows without a significant funding source, the communities may find a smaller scale arrangement that they'd be willing to fund from local appropriations.

## **Look for Collaborative Arrangements to Improve Municipal Functions**

Due to Carlisle's smaller population and heavily residential composition, there are some municipal functions that cannot be provided in the same way as in larger surrounding communities with larger staff capacity and a significant commercial tax base. Identifying areas of shared need and building collaborative arrangements with some of these larger neighbors may enable Carlisle to take advantage of economies of scale and improve overall service delivery. Three such areas that merit further consideration include Development and Housing Services, Regional ADA Transit, and the Town's GIS services.

### *ADA Transit*

Carlisle's COAHS manages the Town's transportation program for seniors and others who may need accessible transportation services. With a current fleet of three vehicles including two accessible vans, and 7 drivers, Carlisle provided 2,148 trips in 2022. Staff reflected that transportation service is one of the strongest functions of COAHS, but has generally been an entirely internal service, and that they were not aware of any outreach or connection with either regional transit agencies or other towns regarding ways to scale up the service. Carlisle rests in the service area for the Lowell Regional Transit Authority, though it is also an MBTA adjacent small town. It may be fruitful to reach out to relevant regional transit authority contacts and adjacent communities to discuss possible opportunities for integration or partnerships that could build on Carlisle's success in this service area.

### *GIS*

The Town's GIS management is currently the responsibility of the Town Planner, with funding for the work provided by reserve funding for the Town Planner position which was filled several months later than initially budgeted for. As of the time of writing, the Town has brought on a consultant to assess the needs and funding options for GIS management once the system is in place. As it is unlikely to require a full-time position, this may be a ripe opportunity to reach out to neighboring communities, discuss needs, and explore the possibility of a shared position. Opening a conversation with neighboring communities with more established GIS systems and practices in place may also be valuable in gathering additional insight into the uses and functions for the Town's new system and inform how the Town would like to continue developing and utilizing the system.

### *Housing Services*

While Carlisle does have a need for housing services, it is hardly at the demand of many of its neighboring communities. With even those communities collaboratively outsourcing much of their housing related work, it would be worthwhile to determine if this strategy is effective and efficient for Carlisle.

## **Build on Existing Collaboration with Carlisle School District**

The Town of Carlisle and Carlisle School District should continue to build upon their early collaborative successes. Through the sharing of payroll, human resources, and facilities management, these two entities have already demonstrated their ability to work with each other and address their shared challenges together. It is important to acknowledge the initial steps that the Town and District have already taken, as many other communities have tried and failed in this collaboration and these efforts have already shown the benefits of this inter-agency collaboration. This early success emphasizes the importance of starting small service sharing efforts and building slowly over time.

The next steps for enhancing service sharing is to continue to identify areas of improvement, while recognizing the boundaries of each entity. While the Town and District serve the same resident's interests, they intentionally operate independently with their own needs, priorities, governance structures, and purpose. From initial conversations it is clear that total migration of finances does not align with the specific needs and objectives of the School District.

Both entities acknowledge that there is room for expansion to increase efficiency and improve operations, particularly in Finance, Human Resources, and Information Technology. It is important to build consensus on short and long-term goals for this collaboration and document the goals and strategies for this collaboration. A well-documented plan provides operational clarity and ensures continuity against disruptions often caused by staff turnover. It can also be invaluable when seeking grant funds, like those offered through the Massachusetts Community Compact Cabinet.

## **Consider Leading Shared Services Efforts**

One of the fundamental lessons in the history of shared and regional services is that they often start with one dedicated department or staff member who finds a need and builds the necessary regional relationships to begin a collaboration. In the course of examining Carlisle's service delivery models, several areas stand out where Carlisle may be in a position to lead a shared services effort. While it may seem like Carlisle is more likely to be a participant, because the surrounding communities are larger and have more resources, this all depends on the scale of the initiative. All of these are areas where Carlisle's size and lean staffing should not prohibit a determined staff member from being able to take the lead on such an initiative with the support of Town Leadership. Nor is this an exhaustive list of the potential opportunities for Carlisle to lead a regional effort.

### *Recreational and Senior Programming*

As discussed previously, Carlisle's Recreation, COAHS, and Library Departments all have strong existing relationships with regional entities and their peer departments in neighboring towns, including informal shared programming for Recreation classes, and virtual programming through the Library and COAHS. Carlisle has the opportunity to invest further in building these relationships through continued program development and expansion.

### *Rural Water Supply*

Carlisle's lack of traditional water and sewer infrastructure sets it apart from many neighboring towns- however it also has the opportunity to build relationships with other rural towns facing similar challenges, especially those within the MBTA sphere of influence. Issues pertaining to providing fire service without conventional urban water supplies may be a particularly ripe area for Carlisle to lead in conversations



with similar communities throughout the state. The specialized equipment needed for these operations may provide opportunities to explore joint procurement agreements as well.

### *Collaborative Procurements*

In addition to the possibilities mentioned above, opportunities for collaborative procurement often arise as materials or resources such as software systems need to be renewed or replaced. Based on the Department interviews conducted by MAPC, departments such as Fire and Conservation will likely require updates or overhauls of their software systems at some point in relatively near future, and these occasions create excellent opportunities to connect with neighbors to see if there are common solutions that could be jointly procured.