



## Strategic Plan Fiscal Years 2020-2022

Approved by the COA Board: August 20, 2019

**Summary:** This document contains strategic direction, background information, significant trends, and internally identified Goals supported by an Action Plan. A glossary aids the reader in understanding unfamiliar terms and organizations. Exhibits supporting conclusions can be found in the Appendices. While maintaining flexibility to work as circumstances dictate or opportunities arise, the COA Department and Board present this strategic plan with suggested improvement actions and annual focus areas to prioritize future direction:

- FY '20 Town/Private funding request for Community/Senior Center; analyze Lyft Transportation pilot program
- FY '21 Continuation of Community/Senior Center Project
- FY '22 Continuation of Community/Senior Center Project

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# Carlisle Council on Aging

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## Section 1: Strategic Direction

The Carlisle Council on Aging (COA) Department advocates for and supports seniors and mobility-challenged persons in town. Capable management and an experienced, enthusiastic staff position the COA for operational effectiveness to maintain or improve the quality of life for Carlisle's age 60+ residents, "seniors" as defined by the Massachusetts Executive Office of Elder Affairs. This long-range plan articulates a strategic vision with measurable actions to achieve the COA's Goals:

- Trust: Ensuring prudent management of the COA
- Independence: Supporting mobility and access for Carlisle's adult citizens
- Connection: Providing opportunities for positive interactions supporting emotional, cognitive, and physical well-being of Carlisle seniors
- Security: Aiding safety and stability for Carlisle seniors

Developed by a COA Board subcommittee, in conjunction with the COA Director and Program Manager, the plan is a "living" document to prioritize objectives, measure progress, and achieve the COA mission. Some of the factors identified by respondents of the 2016 Community Health Needs Assessment (60% of respondents were age 50+) sponsored by Council on Aging, Board of Health and Gleason Library are:

- Social Connectedness
- Transportation
- Information/Community Outreach
- Diverse Housing
- Intergenerational gathering space
- Community planning for substantial growth of the number of older residents, 60+ which by 2030 is estimated at 35% of the population

Many of Carlisle's age 60+ residents want to remain in Carlisle. To that end, COA services and programs must continue to support accessible and safe independent living in one's home. Other components of independent living are access to information, especially on-line, and access to programs and services that support cognitive, emotional, and physical wellbeing. Mobility is also essential, whether within one's home or transportation to support and augment basic needs, such as food shopping and medical appointments. Future considerations include recommendations from the 2015 Transportation Pilot Program for mobility-challenged persons as well as advocacy for additional senior tax relief.

FY '19 has seen a marked increase in Seniors at risk of losing a home due in part to financial difficulties. Often, when a spouse dies or is no longer able to support the family, the remaining partner is not prepared to take on the responsibilities and complexities they face. Current Senior housing options have a very long wait list. There are few resources for these people in Carlisle and other options are few and far between.

A livable community is a connected place. Due to the town's rural nature, Carlisle's age 60+ residents can feel isolated and alone. Stimulation through social programs and services provide participants with an improved sense of security and community. Referrals for local, state, and federal financial support services offer eligible residents alternatives for improving financial stability through such options as the Senior Tax Worker Program, SHINE counseling, and food and fuel assistance. Potential future tax relief programs would benefit qualified, long-term residents.

A key factor in planning for the future priorities that the COA and Carlisle will face is the very large population of Baby Boomers (a segment of over 70 million nationally, born between 1946 and 1964). As of December 2016, this population ranges between 52 and 70 years of age. It is anticipated that within ten years this population segment will represent 45% of the town. (Source: Town Clerk, February, 2017) and will cause a steep increase in demand for COA services. Carlisle must prepare for this increased demand by addressing the needs of Baby Boomers, while evaluating and maintaining its programs and services to older residents.

Retention of Carlisle's age 60+ residents strengthens the town's fiscal foundation. Notably, with roughly 28.75% of the population born before 1959 and typically not enrolling children in public schools, these residents' taxes play a key role in funding the educational needs of the town, while not incurring additional educational costs. However, many residents find the lack of housing alternatives a limiting factor to remaining in town. Existing housing stock offers relatively few smaller/attached, easily-maintained, and/or affordable residences, thereby fueling a trend of Carlisle seniors needing to leave town to find these more livable residence choices. All townspeople, as well as the COA, will need to advocate for more housing alternatives to retain this necessary group of taxpayers.

The COA will continue to work, through marketing and communication efforts, to strengthen the department's identity in order to attract Baby Boomers to its programs and solicit input on additional programs to address their needs. The COA is working to integrate age 50-59 residents in volunteer efforts to ensure a strong COA, poised for the future. With a greater understanding of the impact of this emerging population, the COA is advocating for a community/senior center for additional program and department space.

*To enhance understanding of unfamiliar terms, please refer to the Glossary.*

## Section 2: Background

### Town of Carlisle

Carlisle is a small, rural town about 20 miles northwest of Boston, with a gross population of 5248 (Source: Town Clerk December 31, 2018). Town government is comprised of elected officials and volunteers. The Board of Selectman, the Finance Committee, and a Town Administrator steer town government, budgeting, and spending, subject to Town Meeting approval. Residents of this highly educated, aging, affluent town share these values:

- learning/education
- open space
- strong community connection
- volunteering
- physical well-being

### Priorities

In 2009, the Town Survey identified tax relief, varied housing options, and varied transportation options as priorities. Note that much progress has been made on transportation, though it still requires publicity. COA provides transportation via vans during its office hours using paid drivers and volunteers. After office hours, Carlisle Transportation Service, run by Flow Transportation is available to mobility-challenged residents and other residents. Some residents qualify for a subsidy under this service. Recently an agreement has been made with Lyft to offer a limited subsidized transportation to the residents available at all hours including mobility-challenged persons.

Respondents to the Caring 4 Carlisle (C4C) Survey of 2016 identified three priorities that affect Carlisle's quality of life:

- **Community Planning** - As of 2019 Carlisle is undergoing a multi-year Master Planning project. The COA is involved in this process.
- **Varied Housing Options** - Current options in town include:

Housing Options	# of Units	# Income Qualified Units	Age Restriction?
Village Court*	18	18	All units 62+ or younger if disabled
Malcolm Meadows*	12	0	All units 55+
Rocky Point*	8	2	No
Benfield Farms*	26	26	All units 62+
Permitted Accessory Apartments**	15	0	No
Totals	79	46	56 units age restricted

\*Source: Town of Carlisle Housing Production Plan 2010

\*\*Source: Town of Carlisle Planning Board Office 2014

- **Intergenerational Community/Senior Center** - Several factors are driving the COA in this effort:
  - There is a steady growth in the Senior population (see Exhibit I)
  - There is no one place in town for Seniors to socialize or exercise on a drop-in basis
  - The growth of COA staff is restricted by lack of space in Town Hall
  - COA activities and staff need to be more co-located for productivity
  - Co-location with the Recreation Commission supports the growth of intergenerational activities

## Significant Trends

Several trends impact the Town of Carlisle and its aging population:

- **The Graying of Carlisle (*Exhibit I*):** In 2011, Carlisle’s age 60+ cohort was roughly 20% of the population; in 2014, roughly 24%, in 2016, roughly 27.5%, in 2018, roughly 29.2%. This outpaces today’s national trend and exceeds the national prediction for 2030. “In 2014, 46 million over 65 years lived in United States, accounting for 15% of total population. It is projected to be 74 million in 2030, representing 21% of the total US population. Today the 50+ town population represents 47%. (Source: Town Clerk, December 2018). (US Statistics Source: <https://agingstats.gov/docs/LatestReport/Older-Americans-2016-Key-Indicators-of-WellBeing.pdf>)
- **Maturing of Baby Boomers with Unique Viewpoints and Needs (*Exhibit II*):** Over 70 million Americans born between 1946 and 1964 are known as Baby Boomers. Generally, they expect to work longer and retire later than their parents did. As of January 22, 2019, Baby Boomers (1646 residents) are 31% of the total Carlisle population and have unique needs that must be addressed now and in the future. (Source: Carlisle Town Clerk) “Some 82% of workers age 50 and older say it is at least ‘somewhat likely’ they will work for pay when of retirement age; 11% plan to never retire.” (Source: October 2014 Associated Press-NORC Center for Public Affairs Research at the University of Chicago)

## Why: Department Mission, Target Audience

The mission of the Council on Aging is to provide advocacy and support services to help Carlisle seniors live dignified and independent lives. The COA strives to continually improve the quality of life for Carlisle citizens 60 years and older, by identifying their needs and matching available public and private resources to address those needs. The COA is dedicated to compassion, outreach, and advocacy.

The primary audience is Carlisle’s age 60+ residents. Carlisle, following the guideline of the Massachusetts Executive Office of Elder Affairs, counts people age 60 and over as seniors. This group is outpacing the general Carlisle population growth rate and, in 2018, is 29.1 % of the population or roughly 1526 out of the total Town population of 5248. (Source: Town Clerk, December 31, 2018) The audience can be further broken into adjusted population decade segments:

- 50-59 years of age (17.8%) (emerging Baby Boomers)
- 60-69 years of age (16.6%) (maturing Baby Boomers)
- 70-79 years of age (8.7%)
- 80-89 years of age (3.2%)
- 90+ years of age (0.5%)

Additional audiences are caregivers needing support and referrals and citizens in town needing food and/or fuel assistance, other financial support, or social worker services, and the mobility-challenged.

## **Who: Department, Board, Volunteers, Partners**

In order to advance the quality of life for older adults and mobility-challenged persons, the COA Department plans and implements programs and services to address their needs and coordinates with the Massachusetts Executive Office of Elder Affairs. As of December, 2018, the department is comprised of five office employees on site at Town Hall: a full-time director, a full-time outreach coordinator/program manager, a part-time transportation coordinator and two part-time Outreach and Program assistants. The Town of Carlisle contracts with a licensed social worker for up to eight hours a week. Several part-time van drivers are employees in the field. The COA office is located at Town Hall, enabling collaboration with other town entities. Office hours are posted as well as communicated through the town's website and a monthly newsletter.

The COA Board has nine voting members, appointed by the Board of Selectmen, and several non-voting members (associates). The board meets monthly to provide policy direction, advice, and support for the work of the COA Department. Various subcommittees advance the work of the board and benefit the COA Department.

More than 150 people per year lend their time to help out with COA services, programs, and events. Many also help other departments, both as volunteers and as part of the Senior Tax Worker program. COA volunteers saved the town money by working close to 4,500 service hours in 2018. (Source: My Senior Center (MSC) database)

The COA partners with many town departments and elected officials, community groups and state and regional entities to further the mission of the COA:

- Town of Carlisle - Board of Selectmen, Finance Committee, Town Manager, Treasurer, Town Clerk, Accountant, Housing Authority, Board of Health, Planning Board, Recreation Commission, Building Inspector, Board of Assessors, Carlisle Fire Department, Carlisle Police Department, Gleason Public Library, Carlisle Public School District, Concord-Carlisle High School.
- Community Groups – Friends of the Carlisle Council on Aging, Friends of the Gleason Public Library, Carlisle Garden Club, Carlisle Churches, Concord-Carlisle Community Chest, Girl Scouts, Boy Scouts, National Charity League.
- State Groups - Massachusetts Executive Office of Elder Affairs, Massachusetts Council on Aging.
- Regional Groups - Community Health Network Area, Lowell Regional Transit Authority, Minuteman Senior Services, Regional Transportation Coordinating Council/CrossTown Connect.

## **What: Services and Programs**

The COA offers a broad array of services and programs. Key services include transportation, outreach, fuel and food assistance, and loans of durable medical equipment. During 2018, the Outreach Coordinator made more than 6,635 client contacts (up from 4123 in 2013), an average of 574 a month (up from 344 in 2013). During 2018 there were 2452 rides (down from 2556 in 2017) to more than 150 (down from 162 in 2017) unique (unduplicated) residents. This represents 10% of the target audience. Volunteer drivers provided about 5% of these rides. Typical rides consisted of travel to medical appointments, shopping, events, and COA-sponsored day trips. Programs include social events, health clinics and lectures, exercise classes, nutrition events, and cultural activities. In 2018, programs and services reached about 768 (up from 650 in 2017) unique (unduplicated) seniors or just over 51% of the target audience (up from 46% in 2017). (Source: MSC database)

**Where: Program and Office Venues**

The COA department schedules programs and services across multiple venues. Within Carlisle, venues include: Town Hall, Carlisle Churches, Gleason Public Library, Carlisle Public School, Ferns Country Store, Carlisle Village Court Sleeper Room, and Benfield Farms. Beyond Carlisle, the COA utilizes the Concord-Carlisle High School, Minuteman High School, and Nashoba Valley Technical High School.

The COA department office space is located at the Town Hall and offers regular weekday office hours.

**How: Funding, Technology, Communication**

The COA is supported through an appropriated town budget and a combination of grants, including one from the Friends of the Carlisle Council on Aging, a 501c (3) non-profit organization differentiated from the COA Board. The Concord-Carlisle Community Chest provides grant support as does the Massachusetts Executive Office of Elder Affairs through its State Formula Grant program. The Carlisle COA receives funding through the town's affiliation with the Lowell Regional Transit Authority. *(Exhibit III)*

The COA populates the MSC database to track monthly and annual program utilization and analyze participation statistics to evaluate the reach and relevancy of programs and services.

The COA uses various media to reach its audience(s). Communication vehicles include outreach and response via telephone; a monthly newsletter, *The Carlisle Connection*; weekly Bits & Bytes email reminder, bi-monthly email News You Can Use, and special alerts, as needed; publicity and announcements in the town newspaper, *Carlisle Mosquito*; a monthly local cable access television program, *Carlisle Community Forum*; and social media, currently via Facebook.



### Section 3: Action Plan

Purposeful actions with defined owners and time frames support the objectives to ensure progress toward realization of each Goal.

**NOTE:** The use of the general term “the COA” may include the Director, Staff, Board, Friends, and volunteers.

#### **Goal I - Trust: Ensuring Prudent Management and Open Communication**

##### **Objective A: The COA Director will ensure efficient operation of the organization.**

In support of Objective A, the Director, Staff, and the Board will perform the following operational activities:

###### Director:

1. Direct COA staff, encourage training and development, and provide feedback on an ongoing basis.
2. Hold staff meetings regularly to discuss concerns and opportunities.
3. Communicate with the COA staff, the Town Administrator, and other Carlisle town departments through staff meetings, one-to-one conversations, phone calls, and emails. Act as liaison to the Carlisle community by participating on town committees to assist staff and advocate for Carlisle seniors.

###### COA Staff:

1. Monitor and assess volunteer needs. Train and recruit volunteers. Acknowledge the good work of volunteers.
2. Protect confidential client information.

###### Financial:

1. Prepare annual budget for review by the COA Board, the Carlisle Finance Committee, Town Administrator, and the Board of Selectmen. Prepare and submit incoming receipts and outgoing expenditures to the Town Accountant.
2. Provide advice to and oversight of the COA budget process.
3. Prepare and submit financial reports.
4. Review monthly financial reports. Investigate, plan, and apply for annual or ad hoc grants including but not limited to the Friends of the COA grant, the State Formula grant, and the Concord-Carlisle Community Chest grant.

###### Planning:

1. Forecast facility needs to the COA Board, the Town Administrator, the Board of Selectmen, and other appropriate boards and committees.
2. Monitor staffing needs and advocate for increased hours as demands grows.
3. Update Long Range Plan.

###### Reporting:

1. Comply with applicable federal and state laws and regulations as well as Carlisle town by-laws and keep up-to-date with changes through attendance at Department Head meetings as well as periodic workshops, trainings, and meetings sponsored by the Massachusetts Executive Office of Elder Affairs, the Massachusetts Council on Aging, and other relevant organizations.
2. Prepare, submit, and review operations reports for the COA Board.

3. Track COA-sponsored programs and services by utilizing MSC software, the COA database, as well as other office technology tools.
4. Prepare and submit annual report to the Massachusetts Executive Office of Elder Affairs.
5. Prepare article highlighting COA programs and services for Carlisle's Annual Report; include feedback from the COA Board.

**Objective B: The COA will instill confidence through interactions with the community.**

In support of Objective B, the COA Staff will perform the following operational activities:

1. Produce a monthly TV show called 'Carlisle Community Forum.' Invite guests and other town departments to participate in the forum.
2. Attend the luncheons, breakfasts, coffees as schedule permits.
3. Participate in town-held events such as Old Home Day, as time/resources permit.
4. Provide a caring environment for anyone who walks into the COA office
5. Provide timely and efficient replies to inquiries.
6. Submit a list of selected COA activities to the local newspaper.

**Strategy -**

Goal I is essentially the operational portion of the COA activities. Strategically, the COA will continue to look for opportunities to connect with Seniors and the Town. The COA Board and COA Staff will use monthly meetings as well as individual and group communication to support and advance the needs of Seniors in the community. The Board and Staff will selectively participate in town committees and Boards where advocacy for Seniors is critical. The COA will continue to collect data through My Senior Center and other means to support budget requests, staff, and required reporting. The Master Planning effort provides a forum for the COA to advocate for the needs of Seniors.

**Actions:**

#	Description	Responsible	Due
1	Complete study of low-income numbers in support of request for increased social worker	COA	Q1 FY '20
2	Prepare case for increased social worker hours/staff	COA	Q1 FY '20
3	Assist Director in the process of hiring part time social worker/outreach coordinator	Director, COA	Q3 FY '20

**Goal II - Independence: Supporting mobility and access to transportation for Carlisle seniors & mobility-challenged persons**

**Objective A: The COA will strive to optimize transportation needs for scheduled service during business hours.**

In support of Objective A, the Director and Staff will perform the following operational activities:

1. Monitor transportation services for trends with respect to defined regular service, out-of scope service (hours/days), and ADA-compliant vehicle needs.
2. Monitor usage of all COA vehicles with respect to optimizing utilization.
3. Monitor drivers and their training requirements.
4. Prepare a report of transportation activities and review with the Board.

**Objective B: COA will continue to explore transportation alternatives focused on better service to mobility-challenged and senior town residents.**

In support of Objective B, the COA will perform the following operational activities:

1. Search for and evaluate alternate providers.

**Strategy -**

Goal II deals with mobility and independence for Seniors and the mobility-challenged and focuses on transportation options. Much has been done in this area in the past few years. The COA has found and studied several alternatives, the newest of which is a partnership with Lyft. Strategically, the COA will continue to analyze and evaluate opportunities in this area. The Master Planning effort provides a forum for the COA to advocate for the needs of Seniors in the area of Transportation.

**Actions:**

#	Description	Responsible	Due
1	Prepare and send an RFP for vendors when the new WAVE vehicle is received from LRTA	COA	Q2 FY'20
2	Attend CTC monthly meetings and analyze how CrossTown Connect Membership can benefit Carlisle Transportation	COA	Q1 FY '20
3	Analyze Lyft program and provide recommendations	COA	Q4 FY '21

**Goal III - Connection: Providing opportunities for positive interaction supporting emotional, cognitive, and physical well-being of Carlisle seniors**

**Objective A: The COA will promote connections among seniors, mobility-challenged persons, and other residents to lessen isolation.**

In support of Objective A, the Director and Staff will perform the following operational activities:

1. Promote, schedule, and staff resources for congregate meals held at multiple venues.
2. Team with volunteers, Gleason Public Library, Recreation Commission, and other town resources to develop programs (e.g. Computer Literacy, Community Conversations), including intergenerational programs.
3. Staff and manage Friendly Visitor/Friendly Caller Programs to alleviate isolation.
4. Staff and manage the Meals on Wheels program.
5. Recruit volunteers to host monthly coffees.
6. Recruit volunteers to set up, serve, & clean up after luncheons. Order food & arrange pickup.

**Objective B: The COA will maintain and expand the volunteer corps.**

In support of Objective B, the Director and Staff will perform the following operational activities:

1. Recruit and sustain current and new volunteer force.
2. Manage annual Volunteer Appreciation event.
3. Train volunteers as required and ensure that all necessary paperwork is complete.

**Objective C: The COA will explore opportunities for shared and dedicated program space to foster a sense of community.**

In support of Objective C, the COA will perform the following operational activities:

1. Utilize shared program venues within Carlisle and beyond.
2. Gain community support for a shared community/senior center.
3. Participate in open space and recreational long-range planning when needed.

**Objective D: The COA will monitor, assess, promote, and report on programs and services provided to its target audience.**

In support of Objective D, the Director and Staff will perform the following operational activities:

1. Utilize communication vehicles such as newsletters, email, website, and CCTV to inform target audience of monthly programs and alert them to time-sensitive issues on Medicare, scams, etc.
2. Track current unique (unduplicated) participants utilizing MSC data base and strive to involve more age 60+ residents as participants/clients and users.
3. Utilize communication vehicles, publicity, and branding strategies to ensure the best possible participation rate.

**Objective E: The COA will maintain a website.**

In support of Objective E, the Director and Staff will perform the following operational activities:

1. Maintain a website presence with timely posting of relevant material by the Town Clerk.

**Objective F: The COA will participate in and promote intergenerational activities.**

In support of Objective F, the Director and staff will perform the following operational activities:

1. Team with the Recreation Department and others as needed to support ongoing intergenerational exercise programs e.g. Tap.
2. Team with schools to support ongoing intergenerational cultural programs e.g. Poetry.
3. Team with Recreation Commission to support summer programs with seniors and students e.g. Arabian Horses, Audubon.

**Objective G: The COA will monitor and provide opportunities for social and learning engagement to serve its target audience(s).**

In support of Objective G, the Director and Staff will perform the following operational activities:

1. Independently or collaboratively manage and support programs such as cultural programs/life-long learning, aging-in-place, exercise programs, social programs, and intergenerational programs.

**Objective H: The COA will assess and strive to refer appropriate support to serve Carlisle seniors who experience loneliness, loss, abuse, and/or limited mobility.**

In support of Objective H, the Director and staff will perform the following operational activities:

1. Provide and coordinate services such as Social Worker, Friendly Visitors, Friendly Callers, and Meals on Wheels.
2. Promote, maintain, and utilize the Carlisle COA Elder Resource Guide to facilitate referrals.
3. Address client status updates provided by Friendly Visitors, Friendly Drivers, and others.

**Objective I: The COA will offer programs to support the physical well-being of Carlisle seniors.**

In support of Objective I, the Director and staff will perform the following operational activities:

1. Independently or collaboratively sponsor programs such as exercise activities, abuse awareness and prevention, health clinics, and topical medical awareness sessions.
2. Provide access to supermarkets on a regularly scheduled basis.

**Strategy -**

Goal III, supporting activities and opportunities for socialization, is the core of the outreach and programs offered by the COA. Each year programs are evaluated and those which are not performing are either modified or dropped with new programs being added based on community demand and the availability of instructors and volunteers to facilitate. Examples include the Senior Social Group, the addition of Group Meditation, and support for other Town-wide events such as the new Trails Walk and Carlisle Race Amity Day. Strategically, the COA will continue to analyze and evaluate programs for Seniors - adding, modifying, or curtailing activities as needs evolve. Additionally, the COA will continue to use multiple communication vehicles to publicize and inform Seniors and others in the Town. The COA will continue to participate in the efforts surrounding a hoped-for Community/Senior Center. The Master Planning effort provides a forum for the COA to advocate for the socialization needs of Seniors.

**Actions:**

#	Description	Responsible	Due
1	Turn over Road Race responsibilities to Ferns (or assist Matt Herwick from Ferns in running the intergenerational road race)	COA Director	Q1 FY '20
2	Support completion of Community Center Feasibility study	COA	Q1 FY '20
3	Determine next steps post-Feasibility	COA	Q2 FY '20
4	Determine fund-raising responsibilities with other affected organizations	COA	FY '20
5	Raise funds for the Community Center	COA + Friends	FY '21

**Goal IV - Security: Promoting safety and stability for Carlisle seniors**

**Objective A: The COA will encourage seniors to improve safety in their homes and community.**

In support of Objective A, the Director and staff will perform the following operational activities:

1. Encourage frail seniors living alone to enroll in the RUOK program (an opt-in/signup program).
2. Manage Friendly Visitor and Friendly Caller programs to support the sense of safety and security.
3. Contact target audiences in case of any emergency.

**Objective B: The COA will promote, advocate, and administer federal/state/grant programs in support of target audience financial stability.**

In support of Objective B, the Director and Staff will perform the following operational activities:

1. Research additional funding sources.
2. Administer fuel assistance to any qualified town resident in need.
3. Promote health insurance/benefits counseling (SHINE) to Carlisle seniors.
4. Coordinate access to and/or delivery of donated fresh produce from Gaining Ground, Carlisle Farmers Market, and other options as they are identified.
5. Administer Carlisle Senior Tax Worker Program and advocate for expansion as needed.

**Objective C: The COA will advocate for appropriate senior housing alternatives in town.**

In support of Objective C, the Director, Staff, and Board will perform the following operational activities:

1. Attend meetings to investigate and support housing alternatives.
2. Partner with Carlisle Housing Trust to advocate for future projects as appropriate.
3. Inform and encourage seniors to discuss options with current Housing committee(s).

**Strategy -**

Goal IV, supporting the safety of Seniors, has been growing in cases and time required over the past few years. The complexity of cases involving potential homelessness, aging in place, etc. require the services of not only the COA but also Social Workers attached to both the COA and the schools as well the Police and Fire Departments. These cases are substantially Seniors, but also may be others who find themselves in difficult circumstances. Additionally, tax support, housing alternatives, fuel assistance, and other social services all take time and resources. Strategically, the COA will work to ensure that Town resources are sufficient to support Seniors and others. The Master Planning effort provides a forum for the COA to advocate for the support needs of Seniors.

**Actions:**

#	Description	Responsible	Due
1	Seek support of Board of Selectmen, Finance Director and FinCom to lower interest rate for Senior Tax Deferral and raise income eligibility level	COA	Q1 FY'20
2	Create Warrant Article supporting change to Senior Tax Abatement (lower interest; raise income eligibility)	COA	Q2 FY '20

3	Propose Warrant Article at Town Meeting	COA	Q4 FY '20
4	COA/Board member attend meetings of Master Planning	Board	FY '20 FY '21
5	Review accessory apartment bylaws for changes that can be made to increase affordable options for seniors	COA	FY '20



## Section 4: Accomplishments

### FY' 19 (July 2018-June 2019)

- Revamped support group for single Seniors into a social hour for Seniors
- 4th Intergenerational Road Race held
- Worked with CHNA on the implementation of three efforts supported by their grant
  - Successful hiring of a Public Health nurse and the “Ask a Nurse” program
  - Architect hired for the Community/Senior Center feasibility study
  - Launched the Lyft transportation partnership with Senior discounts
- Supported the implementation of the Master Gardening Class as an Intergenerational activity
- Launched a free monthly Reiki session

### Other:

- Second Carlisle COA Alzheimer’s Walk fundraising team called “Carlisle Fights Alzheimer’s”
- Assisted in a successful Planning Board-led effort to have Carlisle designated as an “Age Friendly Community” by AARP’s office in Washington, D.C.

### FY'18 (July 2017-June 2018)

- Successful launch of a support group for single seniors
- Piloted a Meditation group
- One new Associate Board member
- 3rd Intergenerational Road Race held
- Caring for Carlisle survey analyzed for implementation activities starting in FY '19
- Successfully supported CHNA grant effort; awarded CHNA grant money to use toward Community/Senior Center conceptual study and a Transportation initiative
- Began a search for alternate transportation providers including the CrossTown Connect Taxi Initiative

### Other:

- Successfully advocated for a change in the title and funding of what is now the COA Outreach & Program Assistant position; achieved funding for six additional hours
- Successful receipt of a \$12,900 grant from the CC Community Chest
- Worked with the Town Treasurer to restructure the way the LRTA grant is accounted for in relation to the COA Budget
- Launched a Carlisle COA Alzheimer’s Walk fundraising team called “Carlisle Fights Alzheimer’s”

### FY '17 (July 2016-June 2017)

- Co-sponsored, with Board of Health and Library, the C4C Community Health Needs Assessment
- Piloted a support group for single seniors
- Space Committee completed pre-work for Feasibility Study Warrant Article
- Feasibility Study warrant article brought to Town Meeting (did not pass)
- Transportation Pilot continues
- New Web Site content defined
- 2nd Intergenerational Road Race held
- Advocate for Accessory Apartment Warrant Article (passed)
- Three new Associate Board Members recruited

FY '16 (July 2015-June 2016)

- 1st Intergenerational Road Race held
- Space Committee pre-work for Feasibility Study Warrant Article
- New handicapped-accessible van obtained via a MassDOT Grant through the LRTA
- Introduced Pilot Transportation program with Flow Transportation
- Transportation voucher program launched

FY '15 (July 2014-June 2015)

- Approved Long Range Plan under implementation
- New Logo and Tag Line Approved
- Email Communications Revamped
- Subsidies for Nashoba and Minuteman lunches introduced
- Space Committee Established
- Generations United recognize Carlisle as the Best Intergenerational Community

## Glossary

**Access:** ability to find information; the capability to freely move about one's living unit and local environment.

**ADA:** Americans with Disabilities Act as defined by federal law.

**Adjusted population:** the gross population, removing census respondents who did not provide their ages

**Aging in place:** a concept that expresses a maturing person's goal of staying in his/her home and living independently as long as possible. This may involve in-home aids and adaptations.

**Attached residences:** apartments and condominiums, typically with a smaller footprint, potentially with first floor master suite and fee-based maintenance through an association. Enables aging in place; typical of livable communities.

**Baby Boomer:** demographic segment of over 70 million people born between 1946 and 1964.

**Caregivers:** adult family members, friends, neighbors, paid aides, or other interested parties who monitor and/or care for those in need.

**Caring for Carlisle Health Needs Assessment:** A town-wide survey in 2018 in conjunction with the Health Department which assessed multiple facets of living in Carlisle.

**Carlisle Town Transportation Task Force:** an ad-hoc group entrusted with the development of policy and procedures for the FY15 mobility-challenged adult pilot transportation program.

**CHA:** Community Health Assessment

**Community Health Network Area:** Carlisle is a member of CHNA 15, which is one of 27 Community Health Network Areas (CHNAs) in Massachusetts created by the Massachusetts Department of Public Health in 1992. The CHNAs, an initiative to improve health through local collaborations, are part of a statewide effort to develop, implement, and integrate community projects that effectively utilize community resources to create healthier communities.

**COA:** Council on Aging, a town department. When mentioned in the report it may include the Director, the Staff, the Board, Friends and other volunteers.

**COA Board:** a nine-member volunteer board that supports the work of the COA Department and is committed to compassion, outreach, and advocacy for age 60+ residents.

**Cognitive:** related to thinking, reasoning, and learning.

**Cohort:** a population sector of people sharing common characteristics.

**Communication vehicles:** various media such as print, TV, and online that carry an organization's messages and relevant, timely information to its target audiences; inbound/outbound telephone conversations.

**Congregate meals:** monthly breakfasts and luncheons for the age 60+ community.

**Connection:** positive interaction and communication with others in person, online, and through other media; the receipt of timely information regarding COA programs and services as well as special alerts.

**Cross Town Connect:** a regional consortium that provides shared van and driver scheduling and transportation services; may widen the COA's current geographical transportation radius and expand service hours for member towns. Offers member towns the potential for economies-of-scale and increased service levels. Carlisle will assess potential membership.

**Day trip:** half- or full-day scheduled, fee-based events that provide transportation out of Carlisle for visits to local museums, theaters, historical sites, cultural events, shopping venues, etc.

**Dedicated space:** physical space devoted solely to a specific purpose; ideally this includes utilization, policy definition and scheduling control for the management of a physical location for programming and/or offices.

**Emerging Baby Boomer:** residents age 50-59, future recipients of services and programs, future source of volunteers.

**Focus Area:** an initiative to which attention and consistent effort is applied that results in significant progress. A focus area is not necessarily completed in one fiscal year.

**Friends of the Carlisle Council on Aging:** a volunteer community group whose mission is to raise funds to augment the programs and services of the Carlisle COA Department, differentiated from the COA Board.

**Friends of the Carlisle Public Library:** a volunteer community group whose mission is to raise funds to augment and manage programs and services of the local library.

**Friendly Caller:** volunteer who contacts adults to verify their well-being as needed.

**Friendly Driver:** a volunteer, utilizing his or her own vehicle to provide transportation services or deliver Meals on Wheels.

**Friendly Visitor:** a volunteer who visits, regularly or as available, seniors in need to alleviate isolation and check on their status.

**Gross Population:** all citizens counted in the annual town census.

**Intergenerational:** activities that link and engage age 60+ adults with younger age groups, such as high school or grade school students.

**Local Emergency Plan Committee:** serves Carlisle during natural disasters, utility emergencies and the like. The COA actively participates.

**Livable Community:** a community that welcomes and supports the needs of age 60+ residents by offering connection; emotional, cognitive, and physical well-being programs and services; mobility and access; and a sense of security and stability.

**Lowell Regional Transit Authority (LRTA):** provides driver training for their vans, van maintenance, and access to purchasing discounted vans. Carlisle, as a member town, receives funding from the LRTA.

**Massachusetts Executive Office of Elder Affairs:** a state agency which supports adults age 60+ and assists local COAs.

**Meals on Wheels (MOW):** fresh and frozen meals provided by Minuteman Senior Services and delivered by volunteer MOW Drivers.

**Minuteman Senior Services:** a regional state-funded social service agency that shares information, offers programs, and provides support to age 60+ residents in local communities. A COA Board member acts as liaison to this organization.

**Mobility:** ability to move safely and easily around one's environment.

**Mobility-challenged persons:** residents who experience movement restrictions outside the home and require transportation services; excludes public school persons served by mandatory transportation services.

**MSC:** *My Senior Center* software program, used by the Carlisle COA, tracks service and program utilization to help set benchmarks and measure progress.

**Outreach:** proactive efforts to engage and involve age 60+ adults by providing referrals to services and programs; responsive in a timely and confidential way to individual-initiated requests for services and help.

**Regional Transportation Coordinating Council:** a new local area group dedicated to addressing transportation gaps in local towns.

**RUOK:** Are You Okay?, a safety and peace of mind program that residents can opt into that results in an automated regularly scheduled phone call; offered by the Police Department. Officers follow up on unanswered calls.

**Security and stability:** personal safety and sense of well-being; financial means adequate to meet basic expenses; access to adequate healthcare.

**Seniors:** age 60+ adults, as defined by the Massachusetts Executive Office of Elder Affairs.

**Senior Tax Worker Program:** a program in which income-based eligible age 60+ residents work assigned hours for town departments and receive payment to help reduce property taxes.

**SHINE (Serving the Health Insurance Needs of Everyone) counselor:** a trained volunteer,

certified by the Massachusetts Executive Office of Elder Affairs in many areas of health insurance, including Medicare Parts A, B, and D; Medigap insurance; Medicare HMOs; prescription drug programs; Medicaid; Medicare assistance programs; and other programs for people with limited resources.

**State Formula Grant:** administered by the Massachusetts Executive Office of Elder Affairs, funds are based on recent census data and calculated annually at a state approved rate per senior.

**Strategic Plan:** a vision for the future that sets priorities and contains an action plan; a living document.

**Sudbury Tax Relief Model:** based on resident's age and/or residency longevity, real estate taxes are reduced.

## Appendices

Exhibit I: Trend – Age 60+ Cohort Grows Despite Total Population Decline

Exhibit II: Trend – The COA Must Attract Maturing Baby Boomers

Exhibit III: Funding Sources Augment COA Reach and Impact

Exhibit IV: Internal and External Assessment Guides

### Exhibit I: Trend - Age 60+

	2011	2014	% Change	2015	% Change	2016	% Change	2017	%Change	2018	% Change
Total Pop.	5601	5380	(3.90)	5336	(0.82)	5123	(3.16)	5419	5.8	5248	(3.16)
Age 60+	1207	1357	12.43	1317	(2.95)	1409	4.88	1482	5.18	1502	1.35

In 2011, 21.54% of the population were 60+

In 2014, 25.22% of the population were 60+

In 2015, 24.68% of the population were 60+

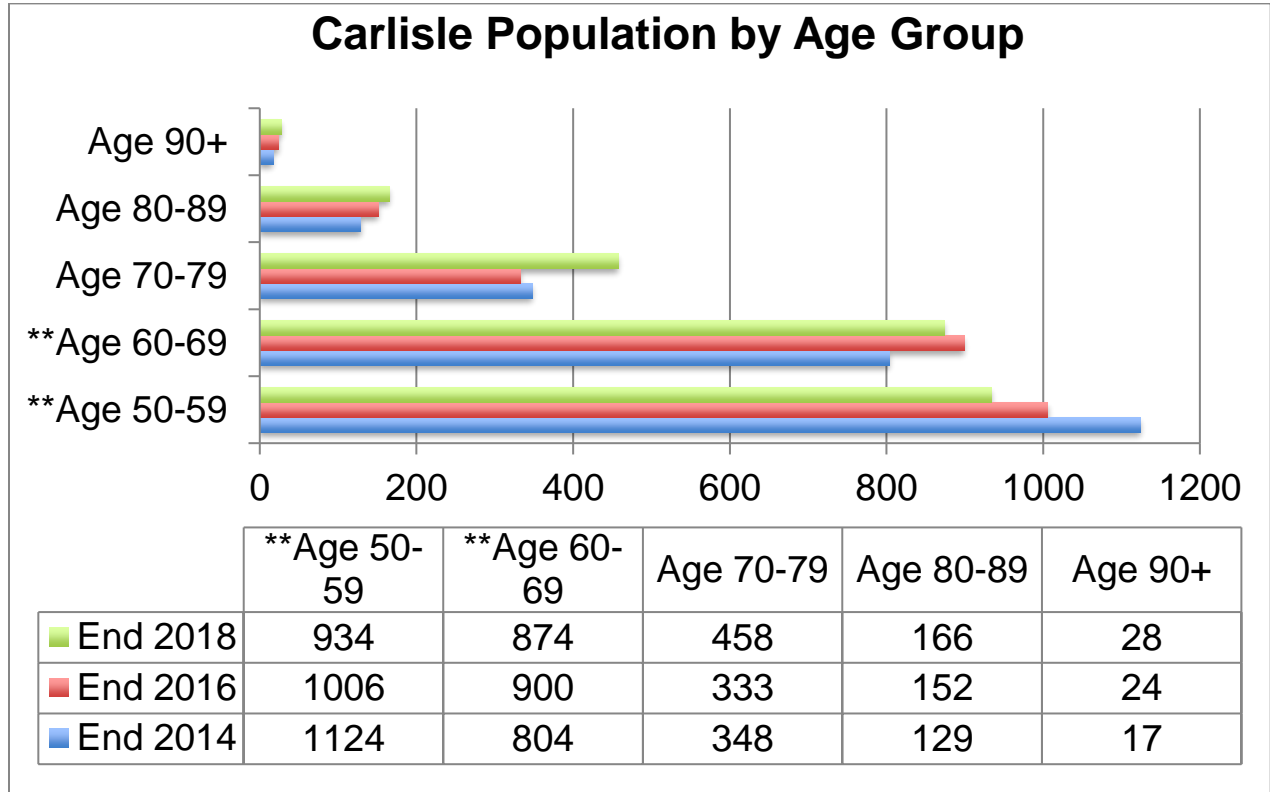
In 2016, 27.50% of the population were 60+, not including 112 whose ages are not known

In 2017, 28.14% of the population were 60+, not including 152 whose ages are not known

In 2018, 28.75% of the population were 60+, not including 24 whose ages are not known

Source: Town Clerk, February, 2014; December, 2016; January 2019

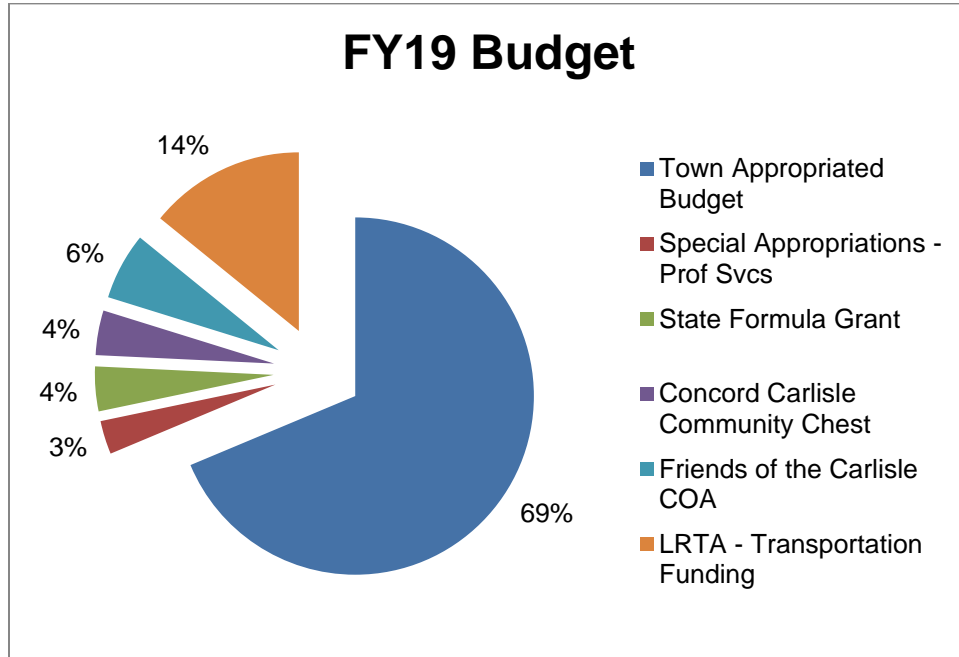
**Exhibit II: Trend - Population by Age Group**



\*\* The scheduling and diversity of COA offerings must attract this population segment.

Source: Town Clerk, February, 2014; December, 2016; January 2019

### Exhibit III: Funding Sources Augment COA Reach and Impact



Source: FY '19 COA Budget Report from FY '20 FinCom Projection



## Exhibit IV: Internal and External Assessment Guides

### Internal Factors

<b>Strengths</b>
1. Experienced full- and part-time staff
2. Wide breadth of programs: social, cultural, wellness (emotional) and fitness
3. Intergenerational programs
4. Able to serve current transportation requests at 99 – 100% level
5. Broad base of volunteers
6. Promotion of support resources to frail/isolated seniors
7. Strong relationships and communication with Town Hall departments
8. Supportive COA Board and Friends of the COA
9. Strong service utilization, double that of towns nationally
10. Multi-channel communication(s) to target audience
11. Provision for financial assistance (food, fuel and tax relief)
12. Utilization of multiple program venues
13. Responsible fiscal management of town funds
<b>Weaknesses</b>
1. Low awareness of COA mission, services, and programs
2. Limited hours and days for transportation services
3. Lack of dedicated space impacts consistent/efficient program scheduling and hinders drop-in programs
4. Some programs with low attendance/no policy for minimal attendance
5. Limited transportation services to mobility-challenged adults
6. Tax relief advocacy (not varied or enough)

### External Factors

<b>Opportunities</b>
1. Friends of the COA funding for fiscal needs
2. Analysis of data to improve services/programs and gauge effectiveness
3. Influence the use of existing and potential community space at Bedford Road, Benfield Farms, Carlisle Public Schools, etc.
4. Expanded Lowell Regional Transit Authority budget
5. BOS request to expand transportation services via FY15 pilot program
6. Assessment of the needs of younger seniors (age 60-69) and emerging audience (age 50-59); widen COA reach
7. Cross-Town Connect may offer the ability to gain efficiencies for the scheduling/scale of transportation services
<b>Threats</b>
1. Increase in senior population, as a percentage of the town, who may need more support
2. Reduction in funding (local, regional, state, private, grants)
3. Some venues could be at risk for program scheduling
4. Inadequate office space for staff and storage
5. Growth and diversity of senior population may need more/different support
6. Attrition of talent and good will of volunteers
7. Rising property taxes
8. Change in town government structure