

APPROVED JUNE 5, 2012

Session Goal: *Develop a plan to become more broadly recognized as the primary advocate for seniors in the Sudbury Community within the next five years.*

Roles & Planning Process:

Participants: COA Board Members—(do the planning and decision-making): John Beeler, Phyllis Bially*, Barry David*, Elizabeth David, Mary-Lee Emerson-Mahoney, Marilyn Goodrich, David Levington, Robert May, Sam Merra, Jack Ryan

Resource: Senior Center Director—(answers questions and contributes if asked): Debra Galloway

Session Leader: (documents session and enforces ground rules): COA Board Member Bob Diefenbacher

Observers: (others present who may respond if questioned by a participant): none

*Newly-elected members

Process:

- First step is to assess the Present (statistical presentations [see Appendix] and SWOT analysis)
- Planning then begins by setting the Objectives (the “WHAT”) to reach the goal
- Next select the Strategies (*the “HOW”*) for achieving the top two objectives
- Finally select the COA member responsible for implementing or overseeing the implementation of the strategy (the “WHO”)
 - The responsible person may then select a team to assist and sets action items that will accomplish the Objective on schedule

Ground Rules:

- One subject at a time
- Use complete sentences
- Achieve consensus for each response
- Participants vote individually
- Senior Center Director is resource, but not a participant
- Observers do not participate
- Session Leader enforces ground rules

Senior Center Director Presentation: See the appendix to this document.

COA Strengths/Weaknesses/Opportunities/ Threats (SWOT) Analysis:

Simply listed as stated by COA members without discussion.

Strengths:

- Volunteer Pool
- Board comprised of people who care about each other and seniors and have great mutual respect
- Talent and experience of those over sixty
- Newsletter
- Senior Center well-respected by townspeople and other senior centers
- Ability to overlap with other resources in town: fitness center at L-S, town pool, etc.
- Programs offered
- Positive feedback by participants in programs
- Number of potential advocates for seniors that exist in the town
- Friends and Sudbury Senior Activities

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- Link to the selectmen
- Easy Parking

Weaknesses:

- Seniors not sufficiently visible in town
- Competition from churches, synagogues, universities, library offering lifelong learning
- Image: age stigma
- Seniors don't have a seat at the decision-making table in town (yet!)
- Volunteer pool dwindling
- Do not do enough community outreach
- Transportation (vehicular)
- Walkability in town
- Computer availability and computer skills training at the senior center
- Lack of space
- Lack of detailed research on what seniors need/want
- Continuity for short or long term goals

Opportunities:

- Increase awareness of monthly newsletter online for younger seniors
- Working with Friends, SSAI or others to provide annual scholarship for high school student
- Expand/enhance the Sudbury Senior Center space as the K-8 administrative offices move out
- Provide/develop services for older LGBT population
- Investigate preventing lack of space being a barrier
- Sharing resources with contiguous towns
- Increase collaboration with L-S and the library
- Hold open house for people over 50, inviting them to an appropriate program
- Funding from colleges, universities, foundations, or research grants to create pilot programs, etc.
- Getting a seat at the table for town decision-making
- Conduct more research to identify needs and weaknesses
- Make senior housing work in the town

Threats:

- MWRTA might cancel the van program
- Insufficient funds from town budget or other sources
- Competition
- No succession plan in place for Senior Center staff
- Senior Center space too little
- Land for senior housing too little
- Senior Center needs are not a town priority in terms of space and funding
- Setting unrealistic goals
- Increased property taxes puts more stress on seniors
- Low commercial tax base in town
- People in their 50s (empty nesters) leaving town

SWOT From Friends of Sudbury Seniors:

- **Strengths:**
 - Dedicated, knowledgeable COA board members
- **Weaknesses:**

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- COA work not well known to average senior (except for the van and the Senior Center)
- COA members not known to the public
- Younger seniors do not think COA applies to them
- People don't like to express ideas because they fear being put on a committee
- **Opportunities:**
 - Reach out to younger generations in a positive way (boomers, parents, kids)
 - Add more members to the COA Board
 - Market the COA better
 - Have an open house to say who/what the COA is
 - Get publicity in local papers
- **Threats:** (None stated)

What are Our Objectives?

(Stated in priority order with strategies and responsible COA member below each)

1: Within 6 months the COA establish with the Board of Selectmen, Planning Board, and other relevant boards a formal integration of COA input into any discussion process impacting seniors (not just property taxes.)

Item	Strategy	Responsible	Due Date
1-1	Contact the Board of Selectmen and obtain the Board's commitment to the objective and a methodology to get the COA "at the table"	Jack Ryan	12/31/12
1-2	Contact other boards if 1-1 is positive	Jack Ryan	12/31/12

2: Within 2 years the COA will design, promote, and implement defined community educational/public relations programs.

Item	Strategy	Responsible	Due Date
2-1	Review current programs, evaluate them, and eliminate and add on new ones.	Bob May & Phyllis Bially	TBD
2-2	Publish need for volunteer PR professional to help develop this objective	Bob May & Phyllis Bially	TBD
2-3	Create products that serve younger, working seniors including "off hours" products	Bob May & Phyllis Bially	TBD
2-3a	Research & conduct programs that appeal to young empty-nesters and parents of L-S seniors at the SSC or elsewhere	Bob May & Phyllis Bially	TBD
2-3b	Partner with L-S for programs	Bob May & Phyllis Bially	TBD
2-4	Use Interns to help create and implement programs	Bob May & Phyllis Bially	5/31/14
2-5	Change the public face of the Senior Center	Bob May & Phyllis Bially	5/31/14
2-6	Develop a fund raising program through Friends to support award(s) to L-S students	Bob May & Phyllis Bially	TBD

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3. By 1/31/13 develop a formal proposal to the town manager to increase the budget of the Senior Center significantly.

Item	Strategy	Responsible	Due Date
3-1	Let Mary Ann Biladeau and Maureen Valente know we are doing this	Dave Levington and Bob May	6/15/12
3-2	Provide the same information to FinCom	Dave Levington and Bob May	6/15/12
3-3	Debra and Dave will develop a proposal, including a rationale and present it to the COA Board.	Dave Levington	11/1/12

4. Within 3 years the COA assemble a series of criteria to meet the needs of senior citizens in a community center.

Item	Strategy	Responsible	Due Date
4-1	Develop and conduct a research plan and assign research responsibilities	Dave Levington & Barry David	TBD
4-2	Formulate the set of criteria for COA consideration and action	Dave Levington & Barry David	5/31/15

5. By 12/31/12 COA will create (with Friends) a capital development plan to accumulate \$1 million in 5 years

Item	Strategy	Responsible	Due Date
5-1	COA further discuss the concept and reasoning behind the objective and document the proposal	Barry David & Bob May	9/4/12 Board Meeting
5-2	Go to Friends, discuss our thoughts, explain the objective, and seek their input	Barry David & Bob May	Oct. Friends Meeting

6. Within 1 year COA develop 1 new strategy to improve opportunities for Sudbury Seniors to have appropriately affordable housing (such as Frost Farm and/or rental units) and advocate for it.

Item	Strategy	Responsible	Due Date
6-1	Approach Jody Kablack and report back to COA	Dave Levington	9/4/12 Board Meeting
6-2	COA Board to decide next step	Dave Levington	11/30/12

7. Within 1 year develop 1 new new strategy to address high property taxes in Sudbury

Item	Strategy	Responsible	Due Date
7-1	Consult with town finance director and report back to COA board	Dave Levington	9/4/12 Board Meeting
7-2	COA Board to decide next step	Dave Levington	11/30/12

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What will we do with the results of this planning session?

- 1. Bob Diefenbacher to type up the flipcharts, create a PDF document and distribute to COA participants in the planning session and the Senior Center Director**
- 2. After the June COA Board Meeting Dave Levington will distribute copies to appropriate town officials with a cover letter as chairman of the COA that includes within the letter 2-3 items we want to emphasize.**

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Appendix

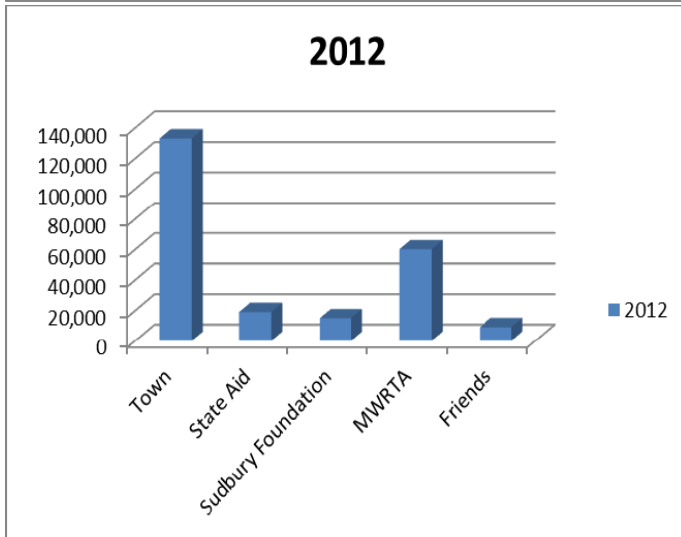
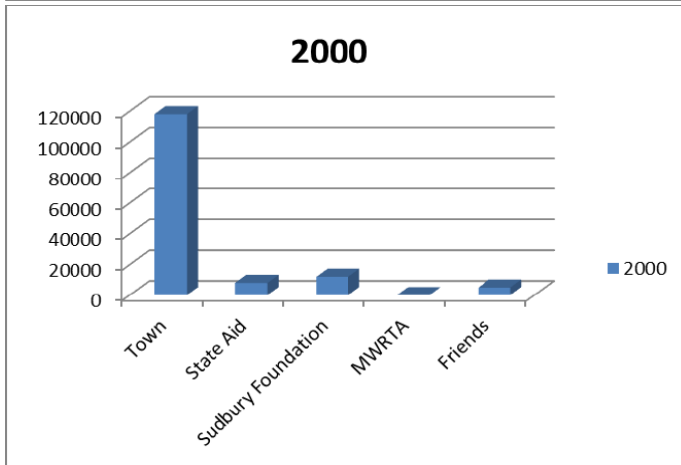
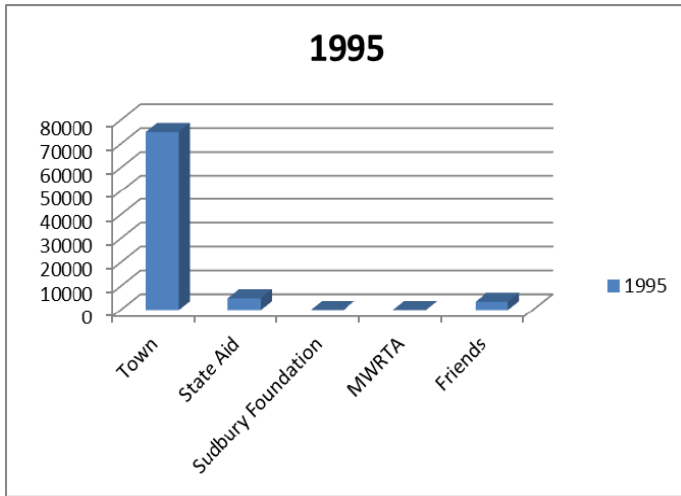
Senior Center Staffing History			
Staff Position	1995	2000	2012
Director	Full time	Full time	Full time
Admin. Assistant	2 Part time (AM/PM)	Full time	Full Time
Outreach/Information	Part time	Part time	Part Time
Van Driver	Part time (on Town payroll)	Part time (on Town payroll)	Full Time (not on Town payroll)
Volunteer Coordinator	-	Part time (not on Town payroll)	Part Time (not on Town payroll)
Receptionist	-	-	Part Time (not on Town payroll)

Participation Levels at the Senior Center			
	1995	2000	2012
Number of Participants*	1,000	1,133	2,040

* Estimated annual number of individuals who participated. 1995 data from 1995 Town Annual Report, 2000 and 2012 data from EOEA annual report.

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Sources of Senior Center Funding



Results of Sudbury Council on Aging Planning Session May 19, 2012

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Numbers of Residents of Different Age Groups*	
# of persons	Age Category
6,523	50+
3,477	60+
1,033	75+
4	100+
132	90 - 99
492	80 - 89
964	70 - 79
1,886	60 - 69
3,046	50 - 59
3,849	40 - 49

Sudbury Population		
	9/1/2011	5/1/2012
All	18,434	18,103
60+	3,233	3,477
Percentage	17.5%	19.2%

birthyears 1962 and before

birthyears 1952 and before

birthyears 1913 -
1922

birthyears 1923 -
1932

birthyears 1933 -
1942

birthyears 1943 -
1952

birthyears 1953 -
1962

birthyears 1963 - 1972

* Data as of May 1, 2012.

Please note numbers are based on the # of persons who will be in the category as of the end of 2012.

Source: Sudbury Town Clerk - Town Census Data 2012

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Statistics compiled by Don Oasis

OTHER CONSIDERATIONS

CENSUS FIGURES ON THE ELDERLY IN SUDBURY WHO WILL POSSIBLY USE THE SENIOR CENTER:

AGES	<u>1980</u>	<u>1982</u>	<u>1986</u>
50-55	959	1035	967
55-60	<u>635</u>	<u>792</u>	<u>884</u>
TOTALLING:	1,594	1,827	1,851
60-70	533	687	923
70-80	313	335	361
80-90	134	164	206
> 90	<u>31</u>	<u>37</u>	<u>32</u>
TOTALLING:	1,011	1,223	1,522
> 75 TOTALLING:	293	354	407

- THIS CHART REFLECTS THE INCREASE IN NUMBERS OF THE ELDERLY WITHIN THE NEXT TEN YEARS.

- THE SENIORS OF 75 YEARS AND OVER ARE THE LARGEST PERCENTAGE GROUP THAT USE THE SENIOR CENTER.