



STAMFORD SENIOR CENTER, INC.
2018 -2019 BUDGET PROPOSAL

To: Mayor David Martin

Submitted by: Christina K. Crain
President & Executive Director
Stamford Senior Center, Inc.
888 Washington Blvd. 2nd Floor
Stamford, CT 06901

I. **History, Mission & Goals Statement:**

Since 1996, the Stamford Senior Center (SSC), a not-for-profit, 501(c)3 tax exempt, non-sectarian organization, has been the principal organization providing programs and services to culturally and ethnically diverse older adults in Stamford, Connecticut. The SSC is one of just three senior centers in the state not fully integrated into municipal government. A focal point for Stamford's rapidly growing older adult population, the SSC's mission is to provide affordable opportunities for older adults in the greater Stamford area to be active and healthy in mind and body and remain connected to the community in a welcoming, safe and diverse environment. The vision of the SSC is to meaningfully enrich the lives of older adults in the greater Stamford area. Physical, social, spiritual, intellectual, emotional, vocational and environmental wellness are the backbone of active aging. These attributes are the basis for the programs the SSC provides to fulfill the needs, interests and expectations of Stamford's culturally diverse 50-plus population.

Goal 1: Enhance current programs and develop and deliver new programs to meet the needs of the Center's diverse members to enable them to live an active life

Objective 1: Maintain and enhance the array of health and fitness classes that promote our members' physical and emotional wellbeing.

Objective 2: Enhance lifelong learning programs geared towards the new generation of seniors - Baby Boomers.

Objective 3: Hire a part-time program coordinator to identify and implement new program offerings based on member feedback through the annual membership survey and member focus groups.

Goal 2: Attract and train volunteers to fill manpower needs either in connection with administrative needs of the center or delivering new programs.

Objective 1: Establish a volunteer network by tapping into our membership, and utilizing their individual skill sets to expand program offerings.

Objective 2: Explore feasibility of formal internship program to assist with classes, and communications.

Objective 3: Expand volunteer base to assist with administrative tasks, communications and the annual fundraising event.

Goal 3: Deepen communication, collaboration and engagement with the various constituencies including the City of Stamford, other local non-profits, foundations, donors and other sources of contributions.

Objective 1: Plan an annual event at the Center with elected officials, board, donors and members to showcase the Center, its services and programs and raise awareness of the impact the center provides to the community.

Objective 2: Explore how the other two non-profits senior centers in the state raise funds.

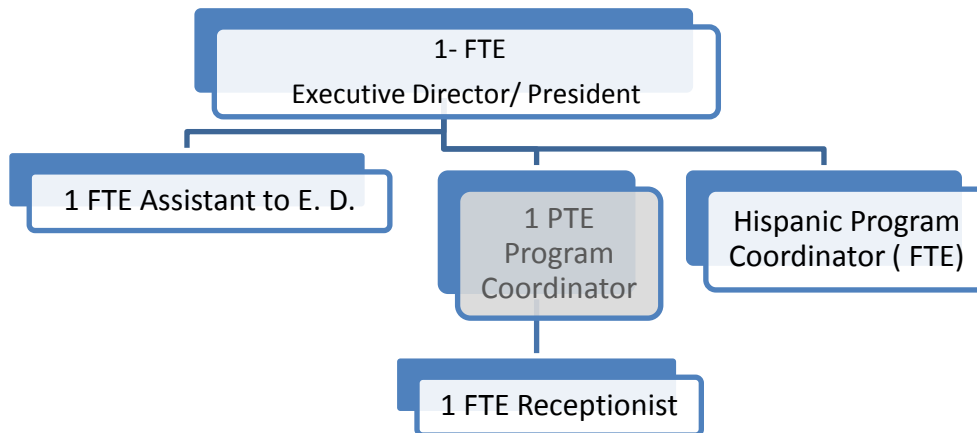
Objective 3: Add members to the board with strong local corporate and business ties to enhance corporate support and event sponsorships.

Goal 4: Establish a repeatable development and fundraising plan and calendar of fundraising activities tied to the annual budget that can be implemented and assessed each year.

Objective 1: Increase fundraising revenue from a variety of fundraising activities including an annual appeal and spring fundraiser by 5% over previous year

Objective 2: Increase grant revenue by 5% over previous year.

II. **Organizational Chart -**



The Executive Director (full time position) is responsible for the overall direction, administration and operations of the Senior Center, including fundraising, program development, grant writing, outreach, social services and marketing. The ED Assistant (full time) supports the ED and is responsible for the daily scheduling and management of programs and trips. One receptionist (full time) is responsible for greeting members, answering the phone, registering members for programs, distributing transportation vouchers and collecting membership dues. The Hispanic Program Coordinator, partially funded by a grant through The Southwestern CT Agency on Aging (SWCAA), is responsible for developing and conducting the programming for our Hispanic Senior Group (which numbers approximately 60 members and growing).

The SSC Board just completed a 3 year strategic plan which includes hiring a part-time Program Coordinator in the 2018/19 fiscal year to assist with program development. The addition of this

position will alleviate some of the ED's responsibility of this work and better position her to focus on her key responsibilities, including researching additional grant and donor opportunities and enhancing community outreach to promote the Center.

The SSC is governed by a volunteer Board of Directors, currently numbering 17, who make tremendous contributions to the SSC both financially and in manpower, and also provide subject matter expertise across an array of skill sets including non-profit operational, banking, human resources, technology, elder care and legal expertise.

III. **Fiscal Year 2016/2017 (FY16/17) Operating Results:** See "Attachment A"

Fiscal year 2016/2017 was another successful year for the SSC. The ED was successful in securing small grants through Purdue Pharma, First County Bank Foundation and St. John's Community Foundation, to enhance and support the SSC Health & Wellness Programs and English as a Second Language (ESL) classes. However, our transportation grant through the Greater Stamford Transit District was cut by 25% over the previous year while bus fares and Easy Access para-transit fares increased in the same year. This posed a hardship for the Center as we tried to make up these costs elsewhere. Thankfully, the SSC had a successful year with its fundraising efforts including our Annual Appeal and spring fundraiser. As a result of the board's fundraising efforts, increased membership dues revenue and the support of some additional grants, the SSC ended FY16/17 with a modest 2% surplus above our projected budget. Our functional expenses were allocated as follows: 84% for programs, 9% for general administration and 7% for fundraising.

In FY16/17 Senior Center member participation increased by 25%, from 34,829 event sign-ins in FY15/16 to 43,427. Participation in our exercise classes increased by 17%, from 10,114 in FY15/16 to 11,830 total participant visits in FY16/17. Participation in our Health & Wellness Programs grew by 35% and our technology classes saw a 40% increase in participation over the previous year. Our Hispanic Program grew by 25% this past fiscal year and we continue to a steady influx of seniors coming to the Center for social services, information and referral services. All of these statistics support our contention that the demand for the Center's services are increasing significantly.

IV. **Fiscal Year 2017/2018 (FY17/18) Operating Budget:** See "Attachment B"

Four months into FY17/18, the SSC operating budget is at a deficit. This is a direct result of reductions and/or loss of certain state and federal grants previously available to the Center. The Greater Stamford Transit District (GSTD), which has provided a grant to the SSC for many years, did not award any grant dollars in FY17/18. In FY16/17, the Center received \$8,400 from GSTD, and in FY17/18 the Center had budgeted \$10,000 in grant revenue from GSTD. The monies from this grant are used to purchase bus tokens and para-transit vouchers to get our members to and from the SSC for programs and services. The SSC has continued to provide transportation vouchers to our members and has seen a steady increase in our transportation costs over the last year. Our members rely on these vouchers to get to the Center. However, without those grant dollars we

were counting on, we are looking to alternate funding sources to make up that loss in revenue, which we may or may not be successful in procuring.

A second grant through the State Dept. of Transportation helps fund cultural trips for members of the senior center and funds part time staff to administer the Easy Access para-transportation program for seniors. This grant was delayed due to the fact that the state did not have a budget until October. That grant we have been told will come through, but reimbursements for the first quarter of the year were not disbursed as a result of the state budget situation.

We have also incurred a 12% decrease in a federal grant through SWCAA that funds part of the Hispanic Senior Program at the SSC. States received 17% less in Title III Older Americans Act funds as compared to last year.

In order to make up some of the deficit, the SSC has outsourced our newsletter printing costs to another company that will print the newsletter at no cost to the center. This is projected to save the organization roughly \$5,000 in printing costs for the remainder of this fiscal year. The Board is working diligently on planning another successful spring fundraiser to help offset the deficit, and the Executive Director continues to pursue additional grant.

These are challenging times for non-profits as state and federal grants have shrunk while the older adult population is exploding. The new changes to the federal tax law may also result in fewer individual donations to non-profits as fewer people will itemize their deductions under the new tax plan.

V. Proposed Operating budget for Fiscal Year 2018/2019 (FY18/19):

The FY18/19 proposed operating budget (see attachment C), was approved by the SSC's Board of Directors on January 4, 2018 for submission to the City.

VI. Audited Financial Statement: see attached financial report for FY16/17 (attachment D)

VII. Budget Narrative

Background and Request: Nearly one – third of the population of the State of Connecticut is over the age of 50, making it the 7th oldest state in the country. This number is going to continue to rise. According to a study by the Connecticut Commission on Aging, by the year 2025, older adults aged 65 and older will make up at least 20% of every town's population, with the exception of Mansfield and New Haven who are home to the University of Connecticut and Yale University, respectively. These cities have large transient student populations, partially masking the growth of the older

adult population. Between 2010 and 2040, Connecticut's population of people age 65 and older is projected to grow by 57%, but its population of people age 20 to 64 is projected to grow by less than 2%. Overwhelmingly, these growing number of older adults want to stay in their communities and to have choices, independence and dignity. To make that happen, we need age diverse, age friendly communities that support their residents across the lifespan.

National studies have shown that keeping older adults healthy, active and socially engaged reduces isolation as well as depression and the risk of falls that otherwise lead to unnecessary hospitalizations and nursing home stays - both of which come at great cost to CT taxpayers.

Research shows that older adults who participate in senior center programs can learn to manage and delay the onset of chronic disease and experience measurable improvements in their physical, social, spiritual, emotional, mental, and economic well-being. The SSC is the first site in Connecticut to pilot a tele-health intervention program for seniors that provide weekly monitoring of their blood pressure, pulse, oxygen levels and weight. This program has been shown to reduce emergency room visits and hospitalizations and result in better healthcare outcomes for participants. The weekly tele-health monitoring empowers seniors to take better control of their health.

The FY18/19 budget proposal respectfully requests \$230,000 in grant funding from the City of Stamford. In order to continue to meet the needs of Stamford's ethnically diverse senior population, the SSC must not only maintain, but also expand, our robust offering of classes and programs. The \$15,000 increase in funding will allow the Center to hire a part time Program Coordinator to help expand programs that engage and enrich the lives of older adults through the aging continuum. This new position will alleviate some of the ED's responsibility of this work, enabling her to focus on her key responsibilities, including researching additional grant and donor opportunities and enhancing community outreach to promote the Center in the greater Stamford community.

Assumptions and related Challenges: The FY18/19 budget proposal assumes the maintenance of all current programs, and the addition of new programs in response to participation growth in our classes and from feedback gathered through our annual member survey. Many of our fitness classes are at or near maximum capacity. In FY16/17, the number of unduplicated individuals attending fitness classes rose by 15% over FY15/16, which saw an 11% increase over FY14/15.

The biggest challenge we now face is lack of physical space to further expand our health and fitness classes. As part of the SSC's strategic plan, the Board and ED will meet with City officials to explore the feasibility of expanding our physical space at the Government Center, for example by enclosing one of the adjacent patios for additional space to expand our programs.

Social Services: Despite the lack of funding for a dedicated social services staff position, the SSC continues to assist members with their social service needs within its limited capacity. Seniors in need of help with housing issues, financial assistance and access to healthcare increasingly are coming to the Center on a daily basis in need of assistance. The SSC took a lead in educating our members about the state's cuts to the Medicare Savings Program, which would negatively impact over 4,000 of Stamford's low-income senior and disabled population. The SSC disseminated timely information and assistance to those seniors who would lose their benefits and helped mobilize people to contact their legislators and let them know how these cuts would hurt them. As a result of these efforts and those from countless other communities across the state, the state legislature

convened a special session during Christmas break to address these cuts and re-instate the income limits for the Medicare Savings Program.

Elderly Hispanic Program: The SSC plans to continue its Elderly Hispanic Program and will re-apply for a grant from the Southwestern CT Agency on Aging (SWCAA) to help fund a portion of this vital program for Stamford's elderly Hispanic community. In FY17/18, as noted above, the federal grant which funds SWCAA was cut by 12%, as Older Americans Act dollars were reduced by 17% over previous year. This, in turn, resulted in a \$4,000 reduction of the grant from SWCAA to the Center and requires the SSC to find other funding sources to continue this program. The total cost to operate the program in FY17/18 is \$98,000, of which SWCAA funds 33% of. The elderly Hispanic community is oftentimes socially isolated due to the language barrier and poor economic status. Community engagement serves a protective role in maintaining and promoting the health, wellbeing and cognitive ability of these older adults. For many of the seniors who attend the program at the SSC, it is a second home to them and the members are a tremendous support system for one another. As the older adult population in CT becomes more ethnically diverse, this program will continue to experience dramatic growth. In the past year, the SSC partnered with Neighbors Link to assist our immigrant members who wish to apply for U.S. citizenship. Twelve of our Hispanic Senior Club members have applied for their citizenship and are in the process of taking the citizenship exam.

Other key assumptions and initiatives: Senior Centers are now serving the needs of three generations of older adults, the Greatest Generation (born before 1925), the Silent Generation (born between 1925 -1945) and the Baby Boomers (born between 1946-1964). Last year, 17% of our members were over 85 years of age, 58% of our members were between 70-85 years of age and 24% were between 50-69. The needs of the Baby Boomer population are vastly different from the needs of the 80 plus population of older adults. Of Connecticut's total population, 17% are Baby Boomers (born 1946-1964) and they will all be 65 + within the next 13 years. It is imperative that the SSC has the resources to continue to plan and provide programs for this population, while continuing to meet the needs of our oldest members to keep them active and healthy. The addition of a part time Program Coordinator will allow us to further develop programs that are relevant and impactful to both of these generations.

Conclusion: The SSC is very grateful to the City of Stamford for its continued financial support and for its in-kind donation of facility space at the Government Center. The City's support has been vital in helping us fulfill our mission of serving Stamford's senior population. For its part, the SSC provides critical services to many Stamford seniors that cannot be found elsewhere, thereby in turn serving all of greater Stamford. However, as the senior population in our state grows exponentially, the Stamford Senior Center must also have the ability to expand its services, space and resources to keep up with the increased demands. Against this scenario, the Center respectfully submits its FY18/19 budget request to the City of Stamford.

FY16/17 Operating Results

	Jul '16- Jun 17 Actual	FY16/17 Revised Budget	Budget Variance
Ordinary Income/Expense			
Income			
City of Stamford	200,000	200,000	0
Memberships	28,068	25,500	2,568
Fund Raising	71,562	53,000	18,562
Restricted Grants -	73,595	70,000	3,595
Hospitality Income	2,067	1,200	867
Program & Other Income	21,438	19,000	2,438
Special Activities	(830)	1,200	(2,030)
Interest	2,345	1,000	1,345
Gifts in Kind - Space	140,000	140,000	-
Total Income	538,245	510,900	27,345
Expense			
Employees	243,118	240,000	3,118
Office Support - NonEmployee	13,862	14,000	(138)
Instructors	51,470	51,500	(30)
Meetings & Trips	3,463	2,000	1,463
Program Supplies	2,283	3,000	(717)
Transportation	15,690	12,500	3,190
Office/Kitchen Supplies	7,256	6,000	1,256
Audit Expense	5,000	5,000	0
Fund Raising Expense	12,366	11,500	866
Insurance	1,185	2,600	(1,415)
Printing & Postage	9,740	5,000	4,740
Equipment Expense	8,020	6,000	2,020
Dues and Subscriptions	1,675	1,600	75
Payroll & Bank Charges	3,458	2,700	758
Travel and Conference	1,071	1,700	(629)
Miscellaneous	1,106	1,000	106
Depreciation	4,800	4,800	0
Occupancy Expense	140,000	140,000	0
Total Expense	525,563	510,900	14,663
Net Ordinary Income	12,682	0	12,682

Stamford Senior Center
Profit Loss Budget Performance
 July - October 2017

	Jul - Oct 2017Actuals	Budget Revised	Year End Forecast
Ordinary Income/Expense			
Income			
City of Stamford	70,000	210,000	215,000
Memberships	27,745	35,000	35,000
Fund Raising	7,306	57,000	57,000
Restricted Grants -	20,364	76,000	70,000
Hospitality Income	751	1,500	1,600
Program & Other Income	7,090	18,700	18,700
Special Activities	1,132	1,600	2,000
Interest	1,000	2,100	2,100
In Kind Contribution	48,336	145,000	145,000
Total Income	183,724	546,900	546,400
Expense			
Employees	90,867	263,000	265,000
Office Support - NonEmployee	4,870	14,500	14,500
Instructors	17,462	56,000	56,000
Meetings & Trips	791	2,300	2,300
Program Supplies	1,484	2,500	3,000
Transportation	6,071	14,300	15,000
Office/Kitchen Supplies	2,188	5,500	5,500
Audit Expense	5,250	5,000	5,250
Fund Raising Expense	3,075	11,000	11,000
Insurance	396	2,600	2,600
Printing & Postage	5,607	10,000	10,000
Equipment Expense	2,571	5,000	5,000
Dues and Subscriptions	943	1,400	1,400
Payroll & Bank Charges	713	2,500	2,500
Travel and Conference	202	800	800
Miscellaneous	276	700	700
Depreciation	1,600	4,800	4,800
Occupancy Expense	48,336	145,000	145,000
Total Expense	192,702	546,900	550,350
Net Ordinary Income	(8,978)	0	(3,950)

	FY18/19 Proposed Budget
Ordinary Income/Expense	
Income	
City of Stamford	230,000
Memberships	35,000
Fund Raising	60,000
Restricted Grants -	80,000
Hospitality Income	2,000
Transportation donations	5,000
Program & Other Income	13,500
Special Activities	1,500
Interest	2,250
In Kind Contribution	145,000
Total Income	574,250
Expense	
Employees	291,000
Office Support - NonEmploy	15,000
Instructors	56,000
Meetings (Board, other misc	3,000
Program Supplies	3,000
Transportation	15,000
Office/Kitchen Supplies	6,500
Audit Expense	5,250
Fund Raising Expense	11,000
Insurance	2,600
Printing & Postage	6,000
Equipment Expense	4,500
Dues and Subscriptions	1,600
Payroll & Bank Charges	2,500
Travel and Conference	800
Miscellaneous	700
Depreciation	4,800
Occupancy Expense	145,000
Total Expense	574,250
Net Ordinary Income	0