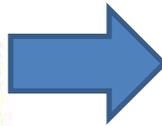


ANALYSIS OF PROPOSAL TO MERGE



**Mecklenburg County
Park and Recreation**
*The Natural Place
To Be...*

March 21, 2014

Prepared By

**FOUNDATION FOR
THE CAROLINAS**

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In 2006, the oldest baby boomers turned 60. When the trend peaks in 2030, the number of people over age 65 will soar to 71.5 million, or one in five Americans. Surveys show that the vast majority of older adults want to and/or will need to 'age in place' – meaning they want to grow old in their own homes. Despite inevitable health issues that come with aging, growing old does not have to follow the trajectory of a 'decline model.' Rather, it can be one of growth and opportunity. However, as a country and a community, we are patently unprepared to serve, support and otherwise



provide more favorable conditions and opportunities for this swelling population of older adults to thrive and remain active and independent in the community, particularly those with more limited means. Navigating the system of services and support for older adults can be difficult at best. Boomers witnessing the challenges their aging parents face can attest to this reality.

Foundation For The Carolinas (FFTC) has identified aging with dignity and independence as an emerging issue on our community agenda. Consequently, we plan to shine the light on this important topic in the coming years. Toward this end, the Foundation agreed to provide a third party perspective on the possible merger of Charlotte Mecklenburg Senior Centers Inc. (CMSC) with the Mecklenburg County Park and Recreation Department (Park and Rec.) FFTC has great interest and experience in supporting mergers of nonprofit organizations that will result in greater efficiencies and the potential for deeper and broader impact in the community. We believe that in this time of shrinking resources and rising service demand, mergers can offer a 'win-win' solution for sustaining and enhancing much needed programs and services in the community.

ABOUT THE PROPOSED MERGER

Currently, both CMSC and Park and Rec offer recreational, educational, social and other programs and activities for older adults. CMSC, a relatively small non-profit, operates three senior centers—Tyvola, Shamrock and North Mecklenburg—where older adults gain access to vital community services that can help them stay healthy and independent. In addition, the organization runs the *Alive After 55* health and wellness program at the Bette Rae Thomas County Recreation Center. Park and Rec also offers an array of programs and activities oriented to older adults through many of its 18 recreation centers. CMSC and Park and Rec already partner in various ways to serve our community's aging population. The spirit of cooperation between them is strong. Mecklenburg County has been a long-time supporter of CMSC, providing approximately 20% of CMSC's annual operating funds. Mecklenburg County also leases to CMSC the land on which the Tyvola Senior Center stands for \$1 a year and provides the ground maintenance for that center.

As proposed, and fully supported by the organizations' leaders, the merger of CMSC and Park and Rec would result in CMSC transferring its assets and resources to Park and Rec, whereby senior services would become a new program area under Park and Rec's Community and Recreation Center Services Division. CMSC's current Executive Director Trena Palmer would, as a County employee, become the Manager of the older adult program area. In this capacity, she, along with other former CMSC staff, would continue providing oversight of the existing senior centers, which would come under the control of the County. As a specialist in senior programming, Trena would also lead Park and Rec's expansion of older adult planning and programming efforts.

Having assessed the details of this proposal to merge CMSC with Park and Rec, FFTC has concluded that the merger would clearly be a 'win-win' situation for both organizations. It makes sense on many fronts. The cultures and missions of the two organizations are compatible and complementary, and the merger would greatly leverage the strengths and resources of both. In summary, this merger would ultimately result in:

- 1. Greater Service and Cost Efficiencies:** Blending CMSC operations and resources with that of Park and Rec would generate efficiencies in both delivery of services and reallocation of resources to better serve the adult population. Two full-time CMSC staff positions that are no longer necessary (Fundraising Director and Finance Director) would be eliminated, as would the administrative costs of operating a nonprofit—e.g. bookkeeping, audits and donor database management. Many of the administrative functions such as payroll services and budget development would be absorbed by the larger Park and Rec business operations. Additional efficiencies and cost savings would be realized by having technology, marketing/communication and other functional areas under one roof.
- 2. Enhanced/Expanded Services and Access to Opportunities for Older Adults:** Programming for older adults would become much more accessible to all county residents as a result of this merger. CMSC would bring a level of subject matter expertise, programming and resource information related to older adults to Park and Rec that the County department currently does not have. With this added dimension and expertise, Park and Rec would be able to offer a much more robust and diverse range of programs and activities for older adults at its current 18 rec centers and at the four planned regional recreation centers. This would include bringing CMSC's preventative services to rec centers such as the Evidenced-



Based Health Promotion and Disease Prevention programs that are currently only available at CMSC locations. These nationally recognized evidenced-based programs have proven to reduce falls and better control chronic illnesses.

Additionally, as more services and activities geared toward the older adult population are offered at rec centers, people who come to the centers for those specialized activities will learn about and be more inclined to take advantage of other programs and activities offered for the general population.

3. Greater Opportunities for Intergenerational Programming: Currently, many of the programs and services offered through CMSC are exclusive to older adults; therefore, the participants are somewhat isolated from the rest of the population. Merging the entities creates opportunities for more intergenerational programming and multi-generational use of County facilities. Today's children and older adults have limited opportunities for meaningful interaction in a country increasingly segregated by age and marked by long distance grandparents and grandchildren. Intergenerational interactions can benefit both the young and old.



4. Stronger Connection to Older Adult Populations within International Communities: Through its Senior Refugee Services offered within CMSC's Shamrock Senior Center, older adults from diverse nationalities are drawn to the center throughout the week. This



includes populations that generally don't participate in community-based activities such as Russians, Bhutanese, Cuban, Vietnamese and Africans. By looping this multicultural, older adult population into Park and Rec via the merger, the County will have an opportunity to engage and connect with more diverse older adults and their family members. As Charlotte becomes even more multi-cultural, this connection will become increasingly important.

5. More Closely Coordinated Services for Older Adults with Other County Agencies: Park and Rec is not the only County agency with a focus on serving older adults. Mecklenburg County Department of Social Services (DSS) has an entire division that addresses senior needs. DSS currently partners with both CMSC and Park and Rec to operate its Senior Nutrition Program at a number of their sites. In addition to funding the Senior Nutrition Program, DSS provides transportation service for many older adults participating in this congregate lunch program. And although it currently doesn't have a specific focus on older adults, the Mecklenburg County Health Department (MCHD) will also likely need to step up efforts to address the public health needs of older adults in the future. According to the 2013 Mecklenburg County Community Health Assessment conducted by MCHD, chronic disease and disability is the number one focus issue. Recommendations to address this issue include: 1) increase opportunities for physical health; 2) use evidence-based interventions (CMSC already offers evidence-based interventions); and 3) develop innovative partnerships. As Park and Rec becomes more involved in providing and overseeing programming for older adults, greater opportunities

to coordinate and collaborate with these other County departments are likely to occur at the leadership and service delivery levels.

- 6. Improved Access to Grant Funding Opportunities:** As the large cohort of Baby Boomers ages and the needs become more visible, federal and foundation grant opportunities are likely to emerge to help meet the growing demand for support. The ability to pursue and secure such grants will be enhanced when senior centers and older adult recreational programming come under the umbrella of a large urban county. CMSC brings 25 years of experience in securing and implementing grants focused on older adult services, but it has been limited by its scope of service delivery in only four locations and seven staff. The merger would allow expansion of service across all recreation centers with their respective staff, thereby making the combined agency a much stronger candidate when applying for grants.

- 7. A Consolidated and Stronger 'Voice' for Older Adult Services in Mecklenburg County:** Through its sheer size and geographic impact, the County is in a good position to serve as a convener and supporter around older adult issues and needs. CMSC brings a history of working with and having deep connections to the community's network of older adult service agencies and providers. Combined, the voice of support for older adults will become louder and more impactful.

In the immediate future, the merger would appear seamless to citizens currently using services at the senior centers and at County recreation centers. Over time changes may occur, but they are projected to be positive ones. When asked about potential downsides of the merger, leaders of both organizations report few to none. Similarly, others in the human service arena who were interviewed about the merger concept expressed only positive views about the value of a consolidated approach to providing services to older adults.

WHY STEP UP EFFORTS TO SERVE OLDER ADULTS IN MECKLENBURG COUNTY?

Encouraging older adults to become and stay active has developed into an important public health priority. Today people can anticipate living beyond 70, continuing to enjoy an extended and productive life. Positive outcomes for older adults include more than physical independence. They include the ability to function and remain active in the individual's setting of choice. In this context, community recreation centers and senior centers can play an important role in how older adults interact in the community around them. The impact of social connectedness and health in older adults who participate in community programs is well documented.

In 2012, approximately 135,200 Mecklenburg County residents were 60+ years old. These older adults comprised 14% of the total county population. By 2022, as Baby Boomers continue to age and life expectancy increases, the number of residents over the age of 60 is projected to climb to nearly 212,640, or approximately 18% of the population. And by 2032, 21% of all county residents are projected to be 60 or older. Community leaders and service providers have a unique and compelling incentive to meet the needs of this growing and increasingly diverse segment of the county's population. Baby Boomers who are becoming part of this aging cohort grew up in a different social and economic climate and bring a different set of life experiences that will affect their needs, preferences and attitudes about aging. Therefore, we will need to think differently about our approach to serving older adults moving forward.

Table 3: Older Adults in Mecklenburg County 2012-2032

Year	Ages 60-64	Ages 65-74	Ages 75-84	Ages 85-99	Ages 100+	Total 60-100+	Total County Population	% Total Population 60-100+
2012*	44,514	53,233	25,959	11,367	126	135,199	962,593	14%
2022** Projected	63,518	91,630	42,419	14,740	333	212,640	1,181,714	18%
2032** Projected	78,331	121,911	70,717	23,719	573	295,251	1,398,618	21%

* Source: US Census Bureau American Community Survey Data 2008-2012

** Source: NC Office of State Budget and Management

According to the 2012 American Community Survey Data for Mecklenburg County residents 60 or older:

- 79.6% are White; 16.4% are Black; 1.5% are Hispanic; 1.1% are Asian; 1.9% are other
- 81.9% are homeowners
- 39.8% live alone
- 59.3% are married; 22.8% are widowed; 13.7% are divorced or separated; and 4.1% never married
- 26.5% remain in the labor force
- \$49,716 (\$40,495 for 65+) is their median household income
- 10.2% are living below 100% of the poverty level and 11.4% are living within 100-149% of poverty the poverty level
- 14.4% have one type of disability; 19.3% have two or more disabilities

THE PROPOSED MERGER

ABOUT CHARLOTTE MECKLENBURG SENIOR CENTERS (CMSC)

Charlotte Mecklenburg Senior Centers became a 501(c)3 organization in 1983 through the support of the United Way, Mecklenburg County, City of Charlotte and the Junior League. Subsequently, the organization opened its first Senior Center in 1984 in a donated space at Hall House, a Charlotte Housing Authority residential building in Uptown Charlotte. In 1989, the center moved to Covenant Presbyterian Church, and in 1994, following a successful capital campaign, it moved again to the then new 16,000 square foot **Tyvola Senior Center**.

In 2002, CMSC opened the **Shamrock Senior Center** in east Charlotte to accommodate the growing Senior Refugee program, and in 2006, secured United Way funding to open the **North Mecklenburg Senior Center** and federal funding to open the **West Side Wellness Center** located within the Bette Rae Thomas Recreation Center. The West Side Wellness Center is possible through a partnership with Mecklenburg County Park and Recreation Department; Park and Rec provides the facility and CMSC provides health-focused programming for older adults. All four sites remain in operation today; however they have all outgrown their space.

Current Programs and Services

The Charlotte Mecklenburg Senior Centers exist to enrich the lives of seniors through programs and services that will improve their health and wellness, decrease their loneliness and isolation and provide social, economic and educational opportunities. Toward this end, the agency offers a variety of programs and activities at the three senior centers. Health-related programming for older adults is also provided by CMSC at the Bette Rae Thomas Rec Center, which complements Parks and Rec sponsored activities at that location. Table 1 provides a quick overview of the types of programming offered at these locations.

Both the Tyvola and Shamrock Centers are federally funded Senior Nutrition congregate meal sites, as is the Bette Rae Thomas Recreation Center. The Mecklenburg County Department of Social Services (DSS) operates 17 such sites across the county, serving approximately 1,750 people. At



these sites, eligible older adults (60+) have access to a nutritious hot lunch five days a week. The beauty of providing meals at the Senior Centers and at County recreation centers is that those drawn to the facilities for the meals most often participate in variety of other center programs such as exercise, arthritis management, arts and crafts, bingo and trips. The meal site is an ideal place for older adults to socialize and build companionships. Coming to meals is the highlight of many people's days. Unfortunately, recent cuts in federal

funds have caused waiting lists to form for meals at the congregate meal sites across the county. Further cuts are expected.

Table 1: Current Programs/Activities Offered at CMSC Locations

Programs/Activities Offered	CURRENT SENIOR CENTERS			
	Tyvola Senior Center	Shamrock Senior Center	North Meck Senior Center	Bette Rae Park & Rec Center
Senior Nutrition congregate lunch*	X	X		X**
Games (bingo, bridge, etc.)	X	X	X	X**
Special events and trips	X	X	X	X**
Exercise/Fitness				
- Table tennis	X			
- Dance, Zumba, etc.	X	X	X	
- Tai Chi	X	X	X	
- Yoga	X		X	
- Aerobics	X	X		
- Group strength/flex training	X	X	X	
- Supervised individual exercise	X	X		X
- Fitness machines		X		X**
- Wii Activities		X		
- Walking club	X		X	
- Nationally recognized evidence-based Health Promotion Disease Prevention Classes	X	X	X	
Computers	X	X		
Arts and Craft Classes	X	X	X	
Lectures/classes (on health, aging, special interests, nutrition and cooking etc.)	X	X	X	
Book and other clubs	X	X	X	
Support Groups	X	X	X	
Legal Services		X		

* The Senior Nutrition Congregate Lunch Program is funded and provided through Mecklenburg County DSS.

**CMSC has no responsibility for offering these programs/activities at the Bette Rae Center.

CMSC operates two other federally funded programs for older adults. These include:

- **The Senior Aides project**, a contracted Title V program of the Department of Labor. The mission of the Senior Aides project is to enable older adults to achieve gainful employment and personal development through community service and training. The dual purposes of the Senior Aides project are to provide useful part-time community service assignments for persons 55 years of age or older with low incomes, while promoting their transition to unsubsidized employment. Approximately 40 seniors are served through the program who, in turn, provide about 32,000 hours of community service to public and non-profit agencies while gaining employment skills.
- **Senior Refugee Services**, provided at the Shamrock Center. Locally known as the Charlotte-Mecklenburg Senior Centers Multi-Cultural Program, these services have been

provided at the center for eleven years with the support of Older Refugee Service (ORS) funds from the federal government. Currently, Shamrock Senior Refugee Services is only one of two ORS funded programs in the state of North Carolina after the federal government reduced ORS funding to North Carolina by 60%. The program currently serves seniors from over ten nationalities including Russian, Vietnamese, Cuban, Bhutanese, Chinese and Latin American. Among other activities, the center provides English as a Second Language classes, citizenship programs, health and wellness programs/screening, arts and crafts, counseling, employment support and access to community supports.

Both the Tyvola and Shamrock Centers have been certified by the NC Division of Aging and Adult Services as Centers of Excellence, which means they meet the State’s highest standards for providing services to older adults. This certification allows these centers to be recognized as viable, fundable, and qualified providers of services within the community and affords them the right to describe themselves as state-certified Centers of Excellence in their literature, grant applications and marketing materials.

UTILIZATION OF SENIOR CENTERS

In FY13, a total of 3,535 seniors used services at all four CMSC locations, accounting for 72,334 visits to the centers. These numbers are down slightly from FY12, but a 65% increase since FY10. The dip in the FY13 number of seniors accessing the centers can be attributed to a significant cut in federal funding related to health programs offered by CMSC at the senior nutrition sites.

<u>Fiscal Year</u>	<u>Center Customers</u>
FY10	2,136
FY11	2,750
FY12	4,023
FY13	3,535

The centers serve a diverse customer base as reflected in the breakdown below of those using the services at all centers in 2013.

<u>Race/Ethnicity</u>		<u>Age</u>		<u>Zip Codes of Largest # of Customers</u>	
White	50%	55-60	3%	South (28209, 28210, 28217)	956 customers
Black	19%	61-70	32%	West (28208)	426 customers
Asian	7%	71-80	39%	East (28205 & 28215)	400 customers
Latino	3%	81+	21%	North (28031, 28036, 28078)	350 customers
Other	13%	Not Identified	5%	Matthews (28305)	85 customers
Not Identified	8%				

In addition, 51% of those served at the centers last year had incomes that were at or below 200% of the poverty level (at or below approximately \$23K for an individual and \$31K for a family of two.)

OPERATIONS

Staffing

Currently, CMSC staff is comprised of 11 positions. Three full-time and one part-time administrative staff members provide direction and support for the overall organization; they are housed at the Tyvola Center. A full-time Director of the Senior Employment Program is also located there. Seven other full and part-time employees work for CMCS providing direct services and support at the Tyvola, Shamrock and North Mecklenburg Centers. Additionally, specialized instructors are hired to teach classes at all the sites, including the Bette Rae Thomas Rec Center, and substitute staff is employed on an as-need basis. All full and part-time staff positions are listed below.

CMCS Current Staff Positions

- | | |
|---|--|
| 1. CMSC Executive Director (Full-time) | 7. Shamrock Ctr. Program Assistant (Full-time) |
| 2. CMSC Financial Director (Full-time) | 8. Tyvola Ctr. Director (Full-time) |
| 3. CMSC Development Director (Full-time) | 9. Tyvola Ctr. Program Assistant (Full-time) |
| 4. CMSC Administrative Assistant (Part-time) | 10. North Meck Center Director (Full-time) |
| 5. Senior Employment Program Dir. (Full-time) | 11. North Meck Program Assistant (Part-time) |
| 6. Shamrock Center Director (Full-time) | |

Several full and part-time staff positions were eliminated from CMSC's budget in 2013 due to funding cuts and increased costs. With only 1.5 to two staff members employed at each of the three CMSC centers, the organization heavily relies on volunteers and Senior Aides to support the day-to-day activities at the centers. Over 100 volunteers—mostly older adults—provide a range of support at the centers, and six Senior Aide workers assist staff on a regular basis. Center directors indicate they would not be able to function without this robust volunteer and Senior Aide support.

Budget

CMSC's FY14 approved budget totals \$1,281,213. Mecklenburg County is the largest single funder of CMSC operations, providing approximately \$260K, or a fifth of the organization's revenues. The United Way is the next largest funder of operations, providing approximately \$209K. Centralina Council of Government (COG) oversees the distribution of approximately \$129K in Home and Community Care Block Grant Senior Center Operations funds plus an additional \$33K for North Carolina Senior Center General Purpose support for the Tyvola, Shamrock and North Meck Centers, as well as support for the Federal Health Promotion/Disease Prevention program offered at the centers.

Approximately \$338K in federal funding for the Senior Service America Title V Program (Senior Aides) is included in CMSC's total budget. Only a small portion of these dollars goes toward administrative support for the program. The majority is for participant programming and stipends. Funding for several other smaller programs is included in the CMSC budget. The

remainder of funds, approximately \$225K, comes from revenues from activity fees, annual discount cards, facility rentals and other non-grant based income as well as from annual fundraising.

On the expense side, personnel costs are CMSC's largest expense comprising approximately 42% of the total budget. Other expenses are included in the following budget summary.

Approved 2013-14 CMSC Budget

CMSC 2013-2014 Budgeted Revenues			CMSC 2013-2014 Budgeted Expenses		
Source	Amount	% of Total	Expense	Amount	% of Total
Mecklenburg County	\$259,616	20.3%	Occupancy Costs (Rent, utilities, maintenance, etc.)	\$130,164.11	10.2%
United Way	218,207	17.0%	Office/Facility Operations (Phone, equipment, Supplies, printing, etc.)	92,032.00	7.2%
Federal/State Grants			Professional Services (Legal, accounting, payroll, etc.)	34,845.00	2.7%
-Centralina COG	158,395	12.4%	Fundraising Expenses	6,610.00	.5%
-Senior Service Title V	358,392	28.0%	Program Expenses	106,352.14	8.3%
-RSVP*	8,600	.7%	Personnel Costs (Salaries, benefits, etc.)	541,531.28	42.3%
-NC Dept. of Insurance	4,527	.4%	Senior Aide Stipends, taxes	341,870.00	26.7%
-NC Office of Refugee Services	48,600	3.8%	1099 Payments	27,718.47	2.1%
Non-Grant Funds			TOTAL EXPENSES	\$1,281,123	100%
-Participant Discount Cards	30,166	2.4%			
-Participant Activity Fees	53,181	4.1%			
-Fundraising	81,485	6.3%			
-Facility Rental	33,700	2.6%			
-Other Income	26,254	2.0%			
TOTAL REVENUES	\$1,281,213	100%			

Assets

CMSC owns the Tyvola Senior Center, but leases the land for \$1 a year from Mecklenburg County Park and Recreation Department under a 50 year lease agreement. It leases the Shamrock center from Aldersgate for \$1 a year and leases space for the North Mecklenburg Center from the Solid Rock Church for approximately \$33,233, including utilities. CMSC owns furniture and approximately 45 computer work stations located in the Tyvola and Shamrock center computer labs and at the other locations.

Liabilities

CMSC has several lease obligations for office equipment and is under service contracts for various facility and operations support such as waste management, security systems, pest control and IT support at Tyvola Center and Shamrock Centers. These leases and service contracts expire at different times over the next several years. In addition, the Tyvola Senior Center has significant issues with roof leaks and its 20 year-old HV/AC systems that need to be replaced. The estimated cost for fixing these problems is \$860K. CMSC has raised approximately \$300K toward these capital improvements.

Organizational Strengths

- CMSC brings to the table a 30 year track record of raising funds and providing quality services for older adults in the community. Despite ongoing financial struggles in recent years, CMSC has weathered the situation by building partnerships, growing its base of volunteer support and maximizing its resources. The staff remains passionate and committed to the well-being of those it serves.
- The organization is using nationally recognized evidence-based practices in its service delivery model.
- It has gained a loyal following over the years, with 14% of the participants coming to the center for seven or more years and 18% coming for the last four to six years.
- CMSC has made great strides in reaching out to and engaging a diverse and multi-cultural customer base.
- CMSC has a strong board of directors that supports the staff and its work.

Organizational Weaknesses/Threats

- The name—Charlotte Mecklenburg Senior Centers—in and of itself creates some communication problems. First, it can easily be implied that with Charlotte Mecklenburg in the name, the centers are run by local government and funding is covered through government dollars. In addition, the term ‘senior’ in the name seems outdated in that aging Boomers often don’t resonate with the term and therefore, look at senior centers as their grandmother’s senior center, not a place that is attractive to them. People often confuse the senior centers as some type of residential nursing home. Consequently, a more contemporary image and branding are needed.
- CMSC has struggled to keep pace with the demand for service. It has outgrown its current facilities and misses opportunities to serve additional older adults because of its locations. Older seniors typically will only drive about five miles to come to a center; therefore,

CMSC is not serving the broader community of older adults. At the same time, the organization has experienced cuts in funding in recent years, thus diminishing its ability to provide the level of desired programming. Reduction in staff positions has pushed the current staff into overload mode to provide programs, raise funds, support the board and fulfill other necessary responsibilities of running a nonprofit organization.

- Sustainability of the organization is always an issue, particularly with a high percentage of funding coming from federal, state and local government, which makes CMSC vulnerable to political swings. In addition, since the recession, private fundraising has become more difficult and competitive in Charlotte, thus making the challenge of fundraising with fewer staff and marketing resources even greater.
- Because of budget limitations, the senior centers only operate during weekday business hours. This is a missed opportunity to engage older adults in the evenings and on weekends.
- Lack of funding also prevents the organization from investing in new technology, staff training and other improvements that could enhance service delivery.
- The Tyvola Senior Center needs extensive repairs to bring it up to standard.

ABOUT COUNTY PARK AND RECREATION DEPARTMENT SENIOR PROGRAMMING

Current Programming

As Park and Rec has been recovering from the drastic budget cuts it incurred during the recession, the department has gradually been building its programming for older adults, which the department views as a priority. It now offers a range of programs and activities specifically oriented to older adults at recreation centers. These activities focus on sports/athletics, cultural arts, education, fitness, wellness and socialization for those 55 and older. Table 2 lists the programs and activities offered at recreation centers during winter 2013/14, illustrating the types and diversity of programming provided.

Table 2: Park and Recreation Programs/Activities for Seniors Winter 2103/14

Program/Activity	Recreation Center
<ul style="list-style-type: none"> - Oil Painting - Senior Computer Class - Beach Body Fit Seniors - Power Walking - Bingo and Beyond - Senior Recreation Club - See Charlotte! 	Albemarle Road
<ul style="list-style-type: none"> - Badminton - Stretch and Tone - Bingo and Beyond - Super Senior Advocates - See Charlotte! 	Arbor Glen Outreach Center
<ul style="list-style-type: none"> - Senior Fitness - Bridge 	Berewick
<ul style="list-style-type: none"> - Bird Watching - See Charlotte! 	Bette Rae Thomas
<ul style="list-style-type: none"> - Active Adults Playing Cards 	Elon
<ul style="list-style-type: none"> - Senior Computer Class - Power Walking 	Hickory Grove
<ul style="list-style-type: none"> - Silver Fox Cheerleaders - Senior Computer Class - Bingo and Beyond - See Charlotte! 	Ivory/Baker
<ul style="list-style-type: none"> - Light and Lively - Social Bridge 	Mallard Creek
<ul style="list-style-type: none"> - Badminton 	Marion Diehl
<ul style="list-style-type: none"> - Bingo and Beyond - Seniors Stepping into Fun and Adventure 	Naomi Drenan Recreation Center
<ul style="list-style-type: none"> - Senior Crafts 	Southview
<ul style="list-style-type: none"> - Social Bridge - Young at Heart Senior Club 	Sugaw Creek
<ul style="list-style-type: none"> - Women's Basketball - Clogging 	Tom Sykes
<ul style="list-style-type: none"> - Chair Aerobics - District and Golden Angels Club 	Wallace Pruitt
<ul style="list-style-type: none"> - Senior Fitness Club - Youth After 55 Club 	West Charlotte

The majority of these activities are free; however, fees are charged to cover direct costs of some. In addition to the types of programs/activities listed in Table 2, Park and Rec offers day trips for seniors and is actively involved in the planning and execution of the annual Mecklenburg Senior Games, which draws hundreds of participants and volunteers. It's also involved in a number of senior athletic leagues.

Utilization of Recreation Centers by Older Adults

In 2013, Park and Rec counted 53,763 visits to its recreation centers by older adults registered for organized senior programs and activities and for the Senior Nutrition Program, which provides a hot lunch five days a week at the Mallard Creek, Bette Rae Thomas and Southview Recreation Centers. This compares to 17,198 visits in FY09 and 34,573 in FY12, or a 212% increase over the past five years. These numbers and visits do not include the many older adults who are members of the fitness centers or take advantage of other programming offered for the general population, although they may be registrants for individual senior programs. Park and Rec leaders report seeing a steady increase in the number of older adults using recreation centers over the past several years, estimating that approximately 25% of all people coming to the recreation centers are older adults.

Operations for Senior Programming

Staffing

Park and Rec center staff that work within the department's Community and Recreation Center Services Division lead some of the programs and activities for older adults. However, the department relies heavily upon volunteers or paid instructors (paid by participant fees) to lead much of the senior programming at the centers. For example, Park and Rec has partnered with several local colleges and universities to provide student instructors with expertise to lead classes. At the Bette Rae Thomas Recreation Center, the department has partnered with Charlotte Mecklenburg Senior Centers to provide health and wellness training through its Alive After 55 Program for older adults who come to that center. As needs and desires for classes or programs are identified, Park and Rec staff works within its network of volunteers and partners to create new opportunities for older adults. The Park and Rec Senior Citizen's Advisory Council works closely with the staff to give input and guidance on how Park and Rec can better serve this growing population of Mecklenburg County residents.

Budget

Currently, budgeting for senior services and activities is incorporated into the department's overall operating budget for the Community and Recreation Center Services Division. The total net budget for all recreation centers in FY14 is approximately \$5.27 million.

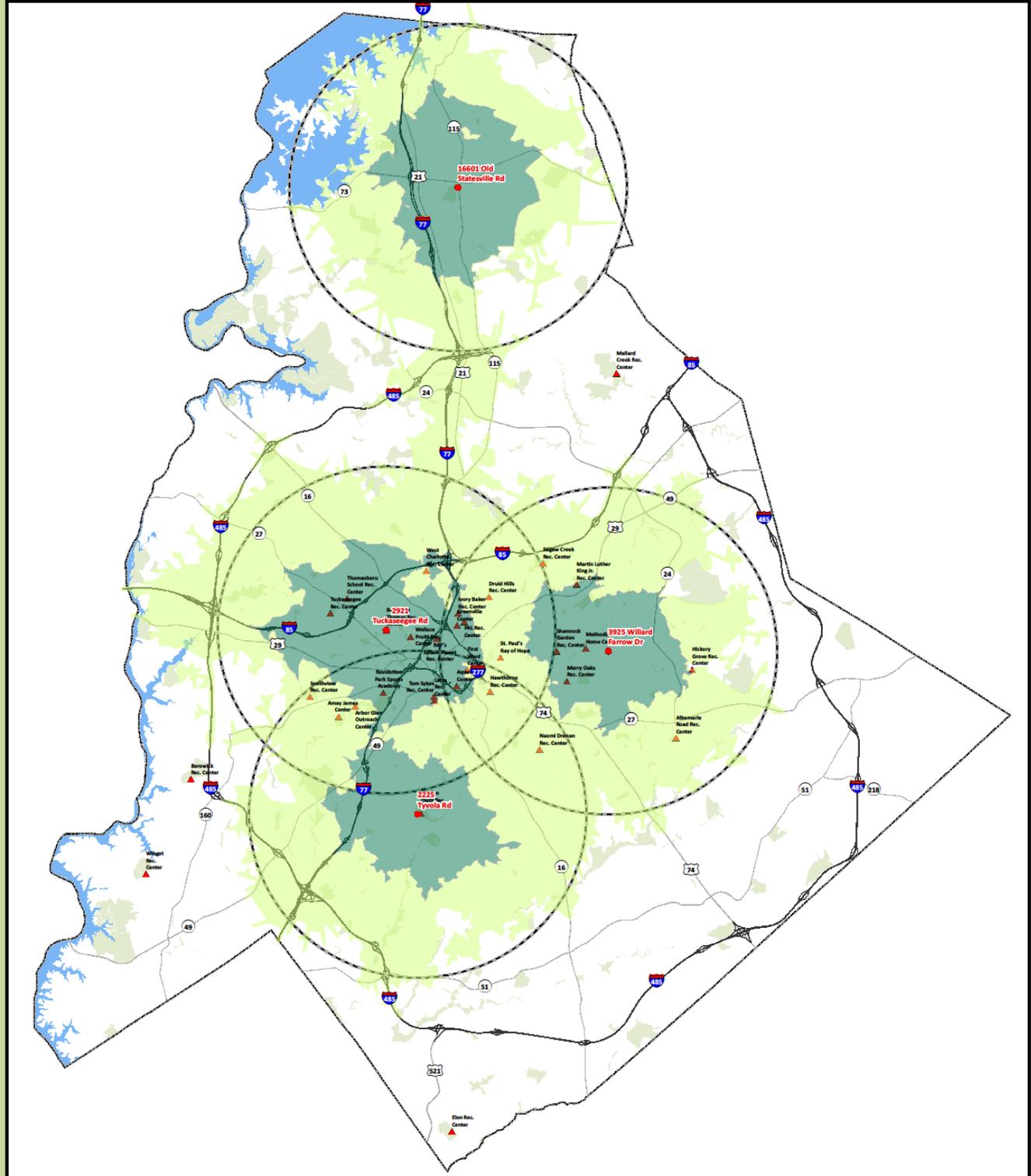
Organizational Strengths

- Park and Rec currently operates 18 recreation centers and has plans to build four large regional recreation centers in the future. It also plans to expand seven existing recreation centers. These centers are located throughout the county, providing access to citizens across the entire community.
- Park and Rec staff is in the business of providing health and leisure activities for the community. It is already well positioned to expand and deepen its focus on providing these services to a larger number of older adults in the future.
- Park and Rec leadership recognizes the need for and is actively committed to making services and programming for adults a higher priority in the coming years.
- Park and Rec resources of parks, greenways, nature reserves, aquatic and recreation facilities throughout the county provide great opportunities for expanding senior leisure activities in the future.

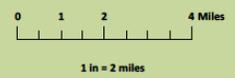
Organizational Weaknesses

- Budgetary constraints limit the ability of the department to grow senior programming as much as it would like to meet the rising demand.
- Although Park and Rec staff is well equipped to offer a range of programming for older adults, it currently does not have staff dedicated to planning for and supporting this specific customer base.
- Some of the recreation centers are lacking facilities that would support additional senior programming. For example, they may not have kitchens that might attract more Senior Nutrition Programs to locate at the centers.
- Budgetary constraints also limit the transportation options for Park and Rec staff to transport seniors to activities.

Senior Inc. Locations with Service Radii displayed using 5 Mile
Straight Line, 5 Minute, and 10 Minute Drive Times with Normal Speed Limits



▲ Recreation Centers	● Senior Inc Locations	○ 5 Mile Radius
— Interstate	● Facilities	■ Parks
— Major Roads	■ 5 Minute Drive Time	
	■ 10 Minute Drive Time	



Mecklenburg County GIS: Wednesday, January 15, 2014

VISION and LOGISTICS OF THE PROPOSED MERGER

Vision

As envisioned by both CMSC and Park and Rec leaders, the proposed merger will enable Mecklenburg County Park and Rec to become a key leader for and provider of leisure and health and wellness programming and opportunities for Mecklenburg County's growing active older adult population.

Within the first year of the merger, a Senior Services Plan will be developed by Park and Rec that will outline short and longer-term strategies for enhancing services for older adults, including revenue generating opportunities. This plan will recommend senior services and programming enhancements at recreation centers, as well as incorporating the design for senior services and related facilities into the plans for the four planned regional recreation centers and expansion plans for the Marion Diehl and Sugaw Creek Recreation Centers. Ultimately, the freestanding senior centers will likely be a thing of the past. Rethinking and rebranding services/programming for older adults to make them more attractive to aging Boomers will be a key planning consideration. The plan will also address ways in which parks, greenways and other outdoor adventure activities can become more age-friendly and how Park and Rec can more closely and creatively coordinate with other County departments and community partners to build a **holistic and coordinated approach to serving our community's older adult population** over the next decade.

Logistics of Merger

As part of the proposed merger:

1. **CMSC staff, minus their current Business and Marketing and Fund Development Directors, would become County employees working in a newly created Senior Services program area within the Community and Recreation Center Services Division.** CMSC Executive Director Trena Palmer would become the Manager of this new program area, responsible for overseeing the four senior centers and their staff and providing strategic direction for expanding Park and Rec services and programming for older adults. A total of seven positions will be included within this program area, in addition to the Program Manager who will report to Community and Recreation Services Division Director II Lola Massard.
2. **Park and Rec would acquire ownership of the Tyvola Senior Center, furniture, equipment and any other capital assets currently owned by CMSC.** As such, Park and Rec will be responsible for making much needed capital improvements to the center, which include replacing the leaking roof and the 20-year old HVAC systems. The estimated cost of these improvements is \$860K. CMSC has already raised approximately \$300K for

these improvements, which will more than cover the cost of replacing the roof. The estimated value of the building is \$2.5 million.

3. **During the first several years after the merger, few changes would be experienced at the current senior center locations.** One positive change would be the ability for the senior centers to be open during evening and weekend hours due to having Park and Rec support for extended hours. A new Recreation Specialist Position will be added to oversee evening and weekend programming as well as facility rentals. This will increase the community's overall access to the centers. Currently staff and budget limitations prevent extended hours. In the long-term, however, as the new regional recreation centers are built and expansion of existing recreation centers take place, the opportunity to move the existing senior centers into more modern, multi-purpose facilities is envisioned. This would create the opportunity to re-purpose the Tyvola Center in the future.
4. **The proposed budget to support the initial merger (see attached) reflects a net cost to the County of \$165,646 in FY15. This includes absorbing CMSC personnel costs and other operating and program costs for all four senior center locations.** An additional one-time cost for the capital improvements to the Tyvola Senior Center would be \$603,074. All current sources of revenue to CMSC would continue, with the exception of the Senior Aide grant dollars. This grant program would shift to another local entity and would not result in any losses to the senior center operations.

Over the next three years, United Way funds for Senior Center programming will be incrementally reduced to zero. (\$217K in FY15; \$108K in FY16; and 54K in FY17. Typically, United Way doesn't fund government programs. However, United Way leaders, who actively support the merger, have agreed to continue funding senior centers at a decreasing rate over the next three years to support the transition from nonprofit to governmental oversight. County Park and Rec will need to offset the loss of United Way funding over time.

5. The **Senior Services Plan**, developed by the new Senior Services Manager in FY15, will identify priorities, a timeline and budget considerations for the growth of Park and Rec's programs over time.
6. **Interested members of the current CMSC Board of Directors will be invited to participate on the County's Senior Citizens Advisory Board** to continue providing guidance and support for adult programming.
7. **Coordination of volunteer efforts will be centralized through the merger, as will marketing and communications related to older adult programming.** This will result in a more substantial network of volunteers and broader outreach to the community.
8. **Private fundraising for senior services** currently undertaken by CMSC as a nonprofit would continue through Partners for Parks, County Park and Rec's nonprofit arm.