

**Ready or Not, Here we Come!  
Preparing for the expected increase of older adults  
in the Village of Shorewood, Wisconsin**

**Shorewood Senior Resource Center Strategic Plan, 2017 - 2021**

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Approved by the Elder Services Advisory Board, June 9, 2016

# Plan Outline

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## What do we know about older adults in Shorewood?

- A Current Demographic Snapshot
- Demographic Projections: Shorewood's older adult population is increasing
- Additional profile of Shorewood's older adults; poverty, living alone, education, language

## What do we know about the needs of older adults and Shorewood's older adults?

- Communities can do more
- Many older adults have disabilities and chronic conditions
- Many have not saved enough for health and long-term care expenses
- There won't be enough caregivers
- Community barriers to aging in place
- Increasing numbers of people with Alzheimer's and dementia
- Needs of Baby Boomers

## What can we learn from previous surveys about older adults in Shorewood?

- 2007 Older adult survey
- 2010 Senior Housing Survey
- 2013 Resident Survey
- Shorewood Vision 2025
- City of Wauwatosa 2015 Senior Assessment
- Area Plan for Milwaukee County

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## Introduction

As Shorewood positions itself for the future, it must prepare for an expected increase in older adults. By 2021, Shorewood's population age 64 and under is expected to decrease while those age 65 and over will increase by over 17%. Around 18% of the population will be age 65 and over; up from 13% in 2010.

Many of these mostly Baby Boomers have active lifestyles and no or few needs (yet) but many older adults have chronic conditions or limitations, there will be fewer caregivers, some have limited fiscal resources and, according to The 2015 United States of Aging Survey, "Older adults are looking to their communities for support as they age so they can continue living in their homes and neighborhoods as long as possible."

Communities across the nation, and even globally, looking to prepare for the future with more older adults, are taking steps to address barriers to aging in place and making their communities livable for all ages.

Shorewood is already well positioned to serve the increasing number of older adults and meet their needs because it has the Senior Resource Center (SRC.) The SRC plays an important role in addressing recognized components of senior-friendly communities and can help Shorewood's continued success in being a vibrant age-friendly village.

Now, however, is the time to take action to do some things differently and more efficiently to prepare to address new and increasing older adult interests and needs.

**The Shorewood Senior Resource Center.** The SRC was created in 2000 during a time of change and opportunity to rethink services for older adults. It was created by Shorewood's newly-formed Elder Services Advisory Board (ESAB) and approved by the Shorewood Village Board of Trustees (Village Board).

The mission of the SRC is to promote safe, healthy and enriching lifestyles for Shorewood residents age 60 and over. As outlined when it was developed, this was to be "accomplished through four components: resource referrals, weekly programming, a volunteer corps, and a monthly newsletter."

When it was created, it was intended that resource referrals would be SRC's major purpose but there would also be "a weekly 'drop-in' on Mondays..." since "Individuals have expressed a desire for a community meeting place for unstructured activities."

Located in the Village Center in the lower level of the Shorewood Public Library, the SRC is a resource for the entire community. It helps older adults find information and support services to help them remain in the community, coordinates volunteer opportunities and, expanding beyond the original intent in response to older adult interest, offers a variety of programs, classes and trips most days of the week.

**Strategic Planning Process.** Recognizing the changing demographics, the SRC undertook a planning process and review of how it is serving Shorewood's older adults and what it should be doing to serve the expected increasing number of older adults. With encouragement from the ESAB, resources from the Benjamin Fund were included in SRC's 2016 budget to undertake a planning process.

The process to develop a five year strategic plan utilized the expertise of the ESAB. The Board served as a "steering committee" and devoted considerable time at their regular meetings guiding the process, reviewing data and findings and helping develop goals and objectives.

The SRC planning process, resulting in development of 5-year goals and objectives, included the following general steps:

- Collection and analysis of SRC service volumes over three years;
- Three SRC participant and older adult resident focus groups;
- Fifteen stakeholder interviews;
- Assessment of nearby senior services and resources;
- Review of recent Shorewood surveys and reports as related to older adults;
- Analysis of available current and projected demographics;
- Review of information regarding senior center best practices, future trends, older adult needs, "senior-friendly" communities, and aging Baby Boomer issues;
- SWOT (SRC strengths, weaknesses, opportunities, and threats) analysis;
- Regular meetings with SRC Coordinator; and
- ESAB guidance.

To incorporate the planning results into SRC's 2017 budget development, the planning was accelerated and occurred from January 2016 through June 2016, with the final report presented to the ESAB at their June meeting.

This Plan lays a framework upon which the goals and objectives were developed. It provides the building blocks for the Plan by addressing:

- What is the SRC and how does it currently serve Shorewood's older adults?
- What do we know about older adults in Shorewood now and in the future, including their needs?
- What is essential to achieving the vibrant, age-friendly vision for Shorewood which this strategic plan supports?

This Plan "tells the story" of the SRC and lays out a blueprint to prepare for the future.

# Shorewood Senior Resource Center Goals and Objectives 2017-2021

## **SRC Vision:**

To help build a vibrant, age-friendly Village by supporting Shorewood's older adults to age well "in community."

## **SRC Mission:**

The Senior Resource Center promotes safe, healthy and enriching lifestyles for Shorewood residents age 60 and over.

## **SRC Goals 2017-2021**

- 1. Empower and support Shorewood's older adults and caregivers in accessing resources to help them age "in community."**
- 2. Serve as the community focal point for engaging and helping Shorewood's older adults to age well.**
- 3. Enhance services to vulnerable and isolated older adults in Shorewood, including reaching out to those who are not using or aware of SRC's services but might benefit from them.**
- 4. Increase outreach to Shorewood's older adults, caregivers and adult children to make them aware of SRC resources, programs and volunteer opportunities.**
- 5. Improve SRC's organizational effectiveness and business operations to better serve Shorewood's older adults.**

SRC Plan fiscal note:

The Plan has been developed assuming current staff resources. The goals and objectives outline a strategy which invests in several initiatives up front to "free up" some staff time to address further objectives in the Plan. Looking at projected increases in the older adult population and increased demand, funding of SRC staff resources might need to be revisited in the future.

An increase in staff resources would enable: enhancing the implementation of key objectives which would set the stage for the SRC being able to serve the expected increase in older adults more efficiently; meeting the increased demand for innovative programming; gearing up SRC's volunteer program to also help with serving more older adults; researching and implementing best practices and national models; addressing more of the identified needs of older adults and helping more who are vulnerable.

Any costs and fiscal resources needed to achieve the Plan goals and objectives would be included in SRC's budget as part of the Village of Shorewood budget process.

**Goal 1.**

**Empower and support Shorewood's older adults and caregivers in accessing resources to help them age "in community."**

*Measurements: Number of visits to SRC resource web page. Number of contacts from Shorewood residents regarding resource information. Number of SRC Facebook friends or other social media members.*

Objective	Resources needed	Time frame
<p>A. Research, assess, compile, and maintain resources inventory, develop policies for online inclusion and develop online directory.</p> <ul style="list-style-type: none"> <li>• Research and expand resources as new technology, phone apps and other innovations are developed which could help older adults.</li> <li>• Increase the availability of information regarding dementia resources and services, for both those with memory loss and family and caregivers.</li> </ul>	<p>Staff hours Volunteer help research resources for database</p>	<p>2017 Research, develop policy, and develop database Ongoing updates  2020</p>
<p>B. Develop an additional SRC web page to have a strong user-friendly web presence and "self-serve" capacity for resource information and links, as appropriate.</p>	<p>As part of several communications related objectives, use Benjamin Fund resources to contract out for a marketing/outreach professional to develop the web page. Staff hours to help develop, and then maintain and update.</p>	<p>2017 Develop web page 2018 Implement</p>
<p>C. Provide personal resource assistance as needed to Shorewood residents, and to provide resource information not appropriate for on-line access.</p> <ul style="list-style-type: none"> <li>• Develop a non-resident policy for re-directing to other resource support.</li> </ul>	<p>Staff hours</p>	<p>Ongoing  2018</p>
<p>D. Develop a SRC Ambassador program to have Shorewood volunteers trained to help provide local resource information and address questions at events or programs.</p>	<p>Staff hours to develop and oversee volunteers</p>	<p>2016 Volunteer recruitment &amp; training, &amp; develop expectations 2017 Test &amp; begin to implement</p>

		2018 Evaluate and adjust
<p>F. Establish a (closed) SRC Facebook (or other social media) network (age 60+) with regular SRC information and resources, and encourage older adults to connect and help each other.</p> <ul style="list-style-type: none"> <li>• Offer "classes" for those uncomfortable with social media.</li> <li>• Promote the availability and advantages of the network.</li> <li>• Offer incentives for joining and occasional perks for logging in.</li> </ul>	<p>As part of several communications related objectives, use Benjamin Fund resources to contract out for a marketing/outreach professional to develop the initial Facebook profile, including photos, and ongoing maintenance strategy.</p> <p>Staff hours to help develop and oversee volunteers, who will help maintain and update.</p>	2020
<p>G. Work with Shorewood's Planning and Development Department, and any other willing partners, to add resource information to SRC's database, or another easily accessible community database, to support older adults facing challenges with home modifications, improvements and home upkeep.</p>	Staff hours	2019
<p>H. Work with Shorewood Connects to develop guidelines and encourage Neighborhood Block groups to reach out and support older adults in their neighborhood.</p>	Staff hours	2019 Ongoing

**Goal 2.**

**Serve as the community focal point for engaging and helping Shorewood's older adults to age well.**

*Measurements: Number of participants. Number of program offerings. Registrations per program. Percent of Shorewood's age 60 and over population engaged each year in programming (goal is 30%). Number of collaborative programs.*

Objective	Resources needed	Time frame
<p>A. Develop mini off-site "pop-up" senior centers in the community.</p> <ul style="list-style-type: none"> <li>• Work with local coffee shops, restaurants, and/or other entities (conducive to older adult conversation) to establish older adult open drop-in opportunities.</li> <li>• The drop-in off-site center might have board or card game times, occasional topical presentations, discussions, resources shared.</li> <li>• A SRC Ambassador would be at the "pop-up centers" to help address resource questions, welcome new participants and facilitate interaction.</li> </ul>	<p>If resources needed use Benjamin Fund Staff hours to develop, implement &amp; facilitate Volunteer hours</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><i>This would be an expanded concept from the Shorewood Connects facilitated "Cuppa Joe" which meets one morning a week and has an average of 6 participants.</i></p> </div>	<p>2018 Develop: establish interest, relationships, pop-up center guidelines and agreements</p> <p>2019 Begin phasing in 1 pop-up center</p> <p>2020 Evaluate; Work to increase number of "pop-ups if successful</p>
<p>B. Establish a drop-in area for older adults with tables/ chairs and self-serve beverages in the Village Center should space become available.</p>	<p>Costs for tables, chairs, coffee equipment - Benjamin Fund</p>	<p>2018</p>
<p>C. Participate in the development of any multi-age, multi-use community space, so that older adult needs are addressed and programming ideas implemented, if such an effort were initiated in Shorewood.</p>	<p>Potential contribution of some Benjamin Fund monies if meets SRC needs.</p>	<p>2017 or when community effort initiated</p>
<p>D. Offer a variety of diverse and responsive programs and activities for older adults, at the Village Center and other locations, that enhance social, physical and mental well-being.</p> <ul style="list-style-type: none"> <li>• Solicit feedback from older adult residents for programs ideas and evaluation.</li> <li>• Collaborate with other</li> </ul>	<p>Program costs: instructors, materials cover through fees and Benjamin Fund. Staff hours</p>	<p>2017 Ongoing</p>

<p>organizations to develop joint programming, especially to reach out to families, caregivers and younger older adults to increase their awareness of SRC and resources available.</p>		
<p>E. Explore coordinating and/or consolidating fitness/ exercise programs with a recreation/fitness entity if barriers to collaboration could be addressed. Such barriers include:</p> <ul style="list-style-type: none"> <li>• different budget jurisdictions,</li> <li>• confidentiality of registration systems,</li> <li>• program locations at places safe and convenient for older adults,</li> <li>• availability of daytime programming,</li> <li>• ongoing and significant older adult advisory input,</li> <li>• accessible outreach,</li> <li>• payment convenience, and</li> <li>• fee subsidization opportunities so programs are affordable for older adults.</li> </ul>	<p>Staff hours</p>	<p>2021</p>
<p>F. Enhance older adult volunteer opportunities and contributions, especially involving younger older adults, by identifying engaging volunteer projects, (including the SRC Ambassadors) recruiting more volunteers, developing volunteer "job descriptions" or expectations, and providing training.</p> <ul style="list-style-type: none"> <li>• In future, assess if part-time Volunteer Coordinator needed to maximize benefit of volunteer help.</li> </ul>	<p>Staff hours</p>	<p>2019 Ongoing</p> <p>2021</p>
<p>G. Collaborate with the Shorewood School District, Recreation and Community Services Department, at their initiative, to assist them in achieving their goal to recruit more adult volunteers for the schools.</p>	<p>Staff hours</p>	<p>2017</p>

**Goal 3.**

**Enhance services to vulnerable and isolated older adults in Shorewood, including reaching out to those who are not using or aware of SRC's services but might benefit from them.**

*Measurements: Number of apartment managers with whom an outreach connection is made. Number of older adults receiving direct services from SRC. Number of Fire Safety Assessments through SRC. Number of Home Sweet Home Assessments. Number of Memory Café participants.*

Objective	Resources needed	Time frame
A. Outreach to Shorewood apartment building managers to inform them of SRC and its services and explore opportunities to connect to vulnerable or isolated seniors.	Cost of outreach materials Staff hours	2017 Collect building/contact information 2018 Begin outreach
B. Work with EMT, North Shore Health Department, to outreach and increase the number of Shorewood's older adults who have Fire Safety assessments, Knox Boxes, Home Sweet Home Assessments, CPR training, Early Awareness of Stroke/Cardiac Issues and Medications alerts.	Staff hours	2017 Ongoing
C. Work with the North Shore Health Department to improve pre-emergency preparedness for older adult Shorewood residents.	Staff hours	2019
D. Continue to work with Shorewood Connect's Dementia Awareness Work Group to build awareness of dementia, enhance availability of supportive services and support the Memory Café by providing administrative functions and recruiting and facilitating volunteers.	Staff hours	2017 & ongoing
E. Working with the North Shore Health Department, assess the need for crisis management capacity for more complicated needs of Shorewood's older adults and explore options for addressing need.	Staff hours	2019
F. Collaborate with the North Shore Health Department and Shorewood Planning and Development to develop approaches to connect to older adult homeowners who might benefit from resources.	Staff hours	2021

**Goal 4.**

**Increase outreach to Shorewood's older adults, caregivers and adult children to make them aware of SRC resources, programs and volunteer opportunities.**

*Measurements: Percent of Shorewood adults age 60 and over who receive the monthly calendar (goal 50%). Number of online registrations. SRC web page visits. Number of doctors, local churches, others who connect with older adults contacted each year regarding SRC services. Number of collaborative programs.*

Objective	Resources Needed	Time frame
A. Improve the SRC web pages on the Village of Shorewood website to have a strong, user-friendly web presence to promote resource, services and program availability and enhance outreach.	As part of several communications related objectives, use Benjamin Fund resources to contract out for a marketing/outreach professional to revise the current SRC web pages. Staff hours to help develop, and then maintain and update.	2017 Develop content web pages 2018 Implement
B. Develop relationships with apartment and condo building managers, local churches, Doctor's offices, to increase awareness of SRC programs and resources.	Staff hours	2017 Begin 2018 Continue Phase-in 2019 Ongoing
C. Collaborate with the Shorewood Library and other willing entities to provide programs to adults, and especially Baby Boomers, to increase their awareness of the SRC and its services and resources.	Staff hours	2017 Ongoing
D. Increase the number of Shorewood's older adult residents who receive the SRC monthly calendar by implementing strategies to increase distribution.	As part of several communications related objectives, use Benjamin Fund resources to contract out for a marketing/outreach professional to develop strategies to increase calendar distribution. Staff hours to help develop, and then maintain and update. Costs related to implementation (mailing, promotions).	2017
E. Revise the format and content of the SRC monthly calendar so it is a better communication tool for older adults.	As part several communications related objectives, use Benjamin Fund resources to contract out for a marketing/outreach professional to revise the SRC monthly calendar format.	2018

	Staff hours to help develop, and then maintain and update.	
F. Revise the SRC brochure to enhance its outreach potential.	As part several communications related objectives, use Benjamin Fund resources to contract out for a marketing/outreach professional to revise the SRC brochure. Staff hours Printing costs	2019
F. Provide regular SRC postings to outreach to older adults and the community on SRC's Facebook page.	Staff hours	2020 Establish page & outreach strategies 2021 Implement

**Goal 5.**

**Improve SRC's organizational effectiveness and business operations to better serve Shorewood's older adults.**

*Measurement: Total amount of donations to SRC and comparison to previous year. Percent of registrations made online.*

Objective	Resources needed	Time frame
<p>A. Undertake a process to reaffirm the role of the ESAB including assessing its responsibilities from a renewed understanding of how advisory boards function, clarifying its advisory role, determining the reports and information needed to fulfill its obligations and developing operating guidelines or by-laws.</p>	<p>Staff hours Use Benjamin Fund for consultant support.</p> <div data-bbox="748 627 1411 877" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><i>Shorewood Connects suggests that, as ESAB goes through this process, it would also be an opportunity for ESAB to reexamine Shorewood Connects, it's context in the community and its projects, with ESAB taking the lead in this process and involving stakeholders.</i></p> </div>	<p>2019 Begin assessment 2020 Implement</p>
<p>B. Purchase and implement an online registration and payment system which is also linked to the SRC website and has on-site capacity.</p>	<p>Benjamin Fund Staff hours</p>	<p>2017 Research options, purchase &amp; set-up system 2018 implement</p>
<p>C. Assess and pursue additional funding and/or endowments to support programming and services especially for Shorewood's vulnerable and isolated older adults.</p> <ul style="list-style-type: none"> <li>• Work with the Shorewood Foundation to address any issues related to increased grants, donations or endowments.</li> </ul>	<p>Staff hours</p>	<p>2019</p>
<p>D. Effectively manage and provide good stewardship of the Benjamin Fund so sufficient funds remain to allow the fund to grow and continue to support Shorewood's older adults for many years.</p>	<p>Staff hours</p>	<p>2017 Ongoing</p>
<p>E. Implement practices identified in senior</p>	<p>Staff and volunteer hours</p>	

center accreditation standards related to good management: <ul style="list-style-type: none"> <li>• Policies and Procedures</li> <li>• Volunteer Handbook</li> </ul>		2019 & 2020 2021
F. If space becomes available in the lower Village Center, reconfigure the layout for the SRC office to accommodate both current staff, so they can more efficiently serve older adults, and additional volunteers.	Staff hours Cost to reconfigure space	2019
G. With an advisory group, review program fee structure to determine effective price points and to what extent additional revenue can be raised to support programming.	Staff hours	2020
H. Improve SRC data collection to better track service volumes and outcomes.	Staff hours	2017 and ongoing

The “Story” behind the  
Shorewood Senior Resource Center  
2017 – 2021 Goals and Objectives.

## **What is the Shorewood Senior Resource Center?**

The Shorewood Senior Resource Center, located in the Village Center in the lower level of the Shorewood Public Library, is a resource for the entire community. It helps older adults and their families or caretakers find information and support services and activities to help them remain and "age well" in the community and live healthy, meaningful lives. There is no membership fee.

The SRC offers services focusing on three main areas:

- **RESOURCES:** Resource information, referrals and assistance;
- **PROGRAMS:** Engaging educational, fitness, or recreational programs, workshops, classes or day trips; and
- **VOLUNTEER OPPORTUNITIES:** Opportunities to contribute to SRC and the community.

### **Resource information, referrals and assistance**

SRC links Shorewood's older adults to resources to enhance their well-being and promote health, safety, economic security and ability to age well "in community," which is the ability to remain in one's own home or community despite changes in health or functioning.

Shorewood older adults, or their families or caretakers, connect to SRC primarily through phone or directly at the SRC office. Over the last three years the kinds of inquiries recorded by the SRC and services for which referrals were made were:

- Home Support services (meals, handymen, cleaning help, snow removal, homemaker services, medical alert systems, energy assistance, and home companion visits);
- Housing options;
- Transportation options;
- Health and insurance issues and prescription drug benefits;
- Legal concerns (consumer scams, housing issues, power of attorney, benefit counseling);
- Tax related information and questions (direct tax assistance is provided through AARP at the Village Center during tax season);
- Social, recreational, learning and volunteer opportunities outside of SRC; and
- Miscellaneous inquiries regarding a wide variety of issues.

As shown in TABLE 1, the volume of referrals made in response to inquiries has remained generally the same over the last three years.

New initiatives, however, such as Milwaukee County's Go Pass Program started in 2015 (which provided free bus passes to older adults) increased SRC inquiries significantly. Questions about taxes also fluctuate and add a high workload volume.

**TABLE 1.**  
**SRC Resources Information Volumes**

	2013 Number of referrals made*	2014 Number of referrals made*	2015 Number of referrals made*
Information and referrals <i>Inquiries not related to Taxes or Go Pass</i>	207	193	208
"Taxes" **	284	136	131
Total referrals excluding Go Pass in 2015	491	329	339
Go Pass, started in 2015			90
Total referrals, including Go Pass in 2015	491	329	429

\* The data record individual referral topics. If an older adult asks about transportation and in-home assistance, SRC recorded that as two referrals. Also, the data sometime include a count for two or more referrals if an older adult makes one call with one question but is referred to two or more different sources. For example, an older adult called looking for engaging activities and was referred to "Osher," UWM Audit" and "Interfaith" which was recorded as 3 referrals. The SRC spreadsheet for recording service activity was revised for 2016 which should improve future service volume reports.

\*\* 2013 volumes included scheduling AARP tax help appointments

Source: SRC Monthly Reports, 2013, 2014 and 2015

In addition to providing resource information, the SRC offers direct assistance to older adults for issues such as Medicare enrollment and choosing a Part D prescription plan. SRC staff also go on joint visits for some Shorewood older adults with the North Shore Health Department (NSHD) to provide referrals and assistance in non-health areas. SRC works cooperatively with the NSHD, Shoreline Interfaith, Shorewood Police Department, and North Shore Fire Department especially to address needs of vulnerable older adults.

The resource information and assistance component of the SRC reflects activity with minimal promotion or awareness of available resource help. Although many Shorewood residents age 60 and over do not need resource help from SRC now, more could likely benefit from such services and many could likely need them in the future.

SRC planning focus groups and interviewees provided very positive feedback about SRC's resource information referral and assistance services. They praised SRC's responsiveness, focus on east side resources, personal service in providing resource help and the staff's understanding of Shorewood older adults' natural support systems. Also SRC is valued for the attention paid to Shorewood's most vulnerable older adults.

SRC also collaborates with other entities to offer other direct-service programs which help Shorewood's older adults. SRC recruits older adult households for Shorewood Connects-sponsored spring and fall yard clean up days. It helps promote North Shore Fire Department safety assessments and Home Sweet Home Assessments. SRC recruits volunteers and handles administrative functions for the Memory Café, for people with dementia and their caregivers, which was initiated through Shorewood Connects.

As shown in TABLE 2, volumes for these programs are low but, according to feedback from this planning process, they are popular.

**TABLE 2.**  
**Volumes for services provided by others with whom SRC collaborates**

	2013		2014		2015	
	Number of programs	Number of Older Adult Households Served	Number of programs	Number of Older Adult Households Served	Number of programs	Number of Older Adult Households Served
Spring & Fall Yard clean up with Shorewood Connects*	2	82	2	66	2	57
North Shore Fire Dept safety assessments (Connected through SRC)	na	0	na	22	na	16
Home Sweet Home Safety Assessments	na	2	na	4	na	0
Memory Café ** (Initiated through Shorewood Connects)	0			0	8	29

\* The total number of households served represents the number of yards cleaned. A household may have both a spring and fall clean up.

\*\* Twenty-nine people with memory loss or their caregivers attended Memory Cafés in 2015.

Source: SRC 2014 & 2015 Year End Reports, EP email 12/3/2015, EP mtg 12/16/15 & 5/17/16

More than the numbers, however, the stories of older adults who have received SRC resource help are compelling:

- A woman was denied installation of grab bars in her shower because studs were not available to which they could be attached. SRC staff researched options, engaged the Home Sweet Home volunteer and worked with the building management and to get a vendor to install grab bars which did not require studs.
- When a woman exhausted her savings which allowed her the extra income needed to remain in her apartment, SRC worked with the Low Income Subsidy program to increase her monthly social security payment to allow her to remain in her current residence.
- When an individual could not get Shoreline Interfaith volunteer to drive to Froedtert Memorial Lutheran Hospital, SRC recruited a local volunteer to drive.
- When the daughter of a non-English speaking older adult was looking for places for her mother to go dancing for recreation, SRC connected her to another older adult Shorewood resident who enjoys the same activity and they continue to go dancing together.
- When an older adult appeared with a suspicious new growth on her face, SRC connected her to a dermatologist on a bus line that accepted her insurance.
- Following a Home Sweet Home assessment, SRC became aware of a home-bound individual and SRC was able to connect her to a neighbor who provided friendly companionship visits.

In these ways and many others, older adult Shorewood residents are helped by SRC's resources information and assistance support to age well "in community."

**Programs: Engaging older adults socially, mentally and physically**

The SRC plans, develops and oversees programs, classes and workshops throughout the year,

responding to older adult interests. Program offerings depend on teacher or speaker availability, staff resources and space availability. SRC aims to keep the programs affordable, convenient and geared specifically, as necessary, toward older adults. Collaboration with other entities, a nationally recognized best practice, is an SRC programming priority.

A calendar of events is mailed or emailed monthly to individuals on SRC's mailing list. As of the end of 2015, there were 658 older adults on the SRC mailing lists: 443 (67%) Shorewood residents and 215 (33%) non-residents. Anecdotically it was noted that the non-residents often seem to be friends or family of residents.

“For not paying dues, its the best club in the world.”  
*SRC Participant*

Programs are varied and include:

- educational classes or programs addressing issues related to health and wellness, economic security, long-term care, insurance, future life planning or various interesting topics such as Buddhism or history;
- workshops such as card-making or book-binding;
- fitness or exercise classes including Zumba, Gentle yoga, or Qigong;
- supportive sessions such as "Let the Sun Shine in;"
- individual tech support;
- social lunches or gatherings;
- opportunities to learn and play various table games; and
- day trips such as excursions to Chicago, the Milwaukee Art Museum, or a tour of Milwaukee's architecture.

“We are not a piddly coffee klatch.”  
*SRC Participant*

According to TABLE 3. the number of participants for programs has increased for social and educational activities and decreased for fitness classes and day trips. Some of the changes are related to efforts by SRC to transition programming and others are the result of teacher and space availability. SRC constantly monitors program registrations and adjusts offerings as possible.

	2013		2014		2015	
	Number of programs	Number of participants*	Number of programs	Number of participants*	Number of programs	Number of participants*
Fitness Activities	169	2,610	289	2,695	226	2,086
Social/Educational Activities	320	4,197	328	4,574	436	4,704
Day Trips	12	393	11	274	9	240
<b>Total</b>	<b>501</b>	<b>7,200</b>	<b>628</b>	<b>7,543</b>	<b>671</b>	<b>7,030</b>

\* Many older adults attend multiple programs. This number is the sum of attendees or participants at each program.; it is not an unduplicated count of the number of older adults served through participation in these programs.

Source: Village of Shorewood 2015 and 2016 Adopted Budgets, EP email 5/10/16

Feedback, received during this planning process from those who participate in SRC programming was positive. There were ideas for improvement and many ideas for new and additional programs. For the most part, those who participate love the SRC.

A profile of who attended SRC programs in 2015 is revealed through a survey sample of participants which is required for SRC's Community Development Block Grant (CDBG) funding. (See Appendix A.) It shows that most participants are female and, for both men and women, most are in their 70's. Just over half of the men and women are Shorewood residents.

From the planning process interviews and focus groups, people indicated that they started participating in SRC because they:

- were new to Shorewood and did not know anyone;
- were widowed and/or lived alone;
- were recently retired;
- contacted SRC originally to volunteer;
- were prompted by an adult child or caregiver to attend; or
- contacted the SRC originally about services for a parent.

The consensus was that "often a life changing event gets people coming to SRC."

### **Volunteer Opportunities**

SRC provides opportunities for older adult Shorewood residents to volunteer and contribute worthwhile services to help SRC do what it does. SRC recruits and oversees volunteer activity, and, although volunteers provide needed services, there is also a commitment of staff resources to best utilize volunteer expertise. Staff time is needed to recruit volunteers, identify appropriate and meaningful tasks, coordinate schedules, train as needed, outline clear expectations and oversee volunteer work.

Currently SRC volunteers help with such tasks as: program planning and registration, advocacy, event set up and clean up, menu planning, attendance, staffing the office, helping make phone calls and transportation.

As of the end of 2015, SRC had 44 active volunteers with a total of 845 volunteer hours recorded. There were also eight volunteers helping with the Memory Café and six University of Wisconsin-Milwaukee students who volunteered to provide individual tech support to older adults.

Planning process feedback indicated support for tapping into the energy and expertise of Baby Boomers and recruiting them as volunteers, especially for intergenerational volunteer opportunities.

### **SRC Budget**

SRC has a budget of less than \$200,000. Total revenues for the SRC in the Village of Shorewood's Adopted 2016 budget are \$191,785 which includes property tax support, Community Development Block Grant funds, SRC programming fees, Donations, and Benjamin Fund contributions.

Over half of SRC's support comes from property taxes. Tax revenue support is \$105,033 in the 2016 Adopted Budget with a small amount devoted to the Shorewood Connects program, which operates separately from the SRC but works integrally with it.

The Senior Resource Center has 1.35 Full-time Equivalent Employees (FTE's); the Coordinator at 36 hours per week (0.9 FTE) and an assistant at 18 hours per week (0.45 FTE). Almost half of total expenditures are for salaries and wages, and fringe benefits for the Coordinator.

Shorewood is unique in the Milwaukee area in having the SRC in large part because of the generosity of a donor who wanted to support activities for seniors. The Benjamin Fund of the Shorewood Foundation is restricted in its uses and disbursement amounts. Funds can not be used for salary and fringe benefits of employees of the Village and the cost of maintenance, utilities and basic expenses associated with the space in which the SRC operates.

A court ruling in 2005 clarified that disbursements from the Benjamin Fund can be used "to support and enhance activities for the members of the Shorewood Senior Resource Center." A 2013 Benjamin Fund Spending policy, adopted by the Shorewood Foundation, defines members of the Shorewood Senior Resource Center to be "all residents of Shorewood age sixty (60) or older." The Spending Policy is to be reviewed at least once every five years.

A goal of the Benjamin Fund is to provide support in perpetuity. Generally the SRC has not tapped the Benjamin Fund to the yearly allowable limit. The 2016 Adopted Budget includes \$52,825 in Benjamin Fund revenue which is the amount "available" to use. The 2015 Actual revenue shows that Benjamin Fund contributions totaled \$24,695 with similar withdrawals the previous two years.

Participant Donations totaled \$4,502 in 2015 more than the two previous years. Senior programming fees declined to \$28,663 in 2015 primarily based on programming changes.

### **SRC Governance**

The SRC is managed day to day by the SRC Coordinator, who reports to the Shorewood Village Manager, who reports to the Village Board.

The Elder Services Advisory Board was created by the Village of Shorewood in 1999 to advise the Village Board and administration on matters related to the needs of Shorewood's older adult residents. They are responsible for determining and reviewing service needs, providing guidance to the Village Manager and evaluating how well services are being delivered.

The SRC Coordinator provides staff support to the ESAB. Both the SRC and Shorewood Connects were created by the ESAB and both report regularly to ESAB which provides advisory policy oversight.

The ESAB consists of seven members, who are residents of the Village and are appointed by the Village Board, serving three year terms. Ultimately the Village Board has organizational oversight and authority to set policy for the SRC as for all other Village of Shorewood departments.

### **Shorewood Connects**

Shorewood Connects was developed and funded by the Village of Shorewood, in 2008, to enhance the ability of older adults to remain in and contribute to the life of the Village. It evolved from the Connecting Caring Communities Partnership, under the direction of the Milwaukee County Department on Aging, funded by The Robert Wood Johnson Foundation, the Helen Bader Foundation and The Greater Milwaukee Foundation.

Shorewood Connects focuses on helping make Shorewood more "senior friendly," "restoring neighborliness to neighborhoods," and bringing generations together in the Village. As such it has

launched several initiatives: Fall and Spring yard clean-up days, Home Sweet Home Assessments to help older adults identify helpful home modifications, the Senior-friendly Business Certification Program, the Shorewood Neighborhood of the Year annual competition, and the "Cuppa Joe" drop-in social gathering once a week.

In 2014 Shorewood Connects formed a Dementia Awareness and Education Work Group from which the Shorewood Memory Café was developed in partnership with the Alzheimer's Association of SE Wisconsin and the Milwaukee County Department on Aging. SRC was and continues to be involved in this effort, recruiting volunteers and handling ongoing administrative functions.

Shorewood Connects receives funding from the Village for a few hours a month for a Project Facilitator and the Benjamin Fund provides hours for a coordinator for the yard clean up days. SRC handles Shorewood Connects administrative functions like bill paying, purchasing, and recruiting households for clean up days and older adult volunteers.

Shorewood Connects was instrumental in two surveys of Shorewood's older adults, the results and findings of which have been incorporated into this Plan.

As a result of Shorewood Connects initiatives and the involvement of older adult volunteers, SRC, Village-wide efforts, and the Shorewood School District's efforts to serve residents of all ages in its recreation and fitness programming, Shorewood received national recognition in 2014. The Village of Shorewood was one of four communities in America to win a MetLife Foundation/ Generations United Americas Best Intergenerational Community Award. It recognized Shorewood as a place that values both youth and adults of all ages.

Any planning for the future of the SRC should support continued success consistent with this award.

“The Village of Shorewood is cited as an example of a National Best Practice Model for Intergenerational efforts. Two years ago we received national recognition; we strive for a community accepting and supportive of all regardless of age.” *ESAB Member*

### **Other programs and services for older adults**

**Programs:** Although Shorewood is unique in the North Shore area for having a senior resource center, other North Shore communities have programming options for their older adults. There are also other Shorewood opportunities for programs and activities for older adult residents.

Feedback from SRC planning focus groups and interviewees, however, indicates that Shorewood residents who participate in SRC programming appreciate the content, convenience and affordability of SRC programs. Also, having multiple programming options is viewed positively since it inspires excellence through competition and provides a larger menu of activities from which to choose.

Other public programming available to Shorewood's older adults and in other North Shore communities include:

- Village of Shorewood Public Library: adult programs; Friends of Shorewood Public Library

- School District of Shorewood Recreation and Community Services Department (Shorewood Recreation Department):
  - Adult classes and programs, including fitness classes, adult enrichment programs, and open pool and swim
  - Shorewood Community Fitness Center (Silver Sneakers availability)
  - Reduced fee program
  - School volunteer opportunities
- University of Wisconsin- Milwaukee, School of Continuing Education, Osher Lifelong Learning Institute (for older adults age 50 and over; classes, events and trips; annual membership fee and class fees)
- North Shore School for Seniors (class fees; classes held at United Methodist Church of Whitefish Bay)
- School District of Whitefish Bay, Whitefish Bay Recreation and Community Education Department Senior/55 and Better: programs, classes, luncheons, events and tours; also Adult fitness and adult enrichment classes; program fees
- Glendale River Hills School District, Nicolet Recreation Department: Adult enrichment and fitness classes and programs for Senior Citizens 60 and over; program fees
- Glendale Senior Citizens Club; membership fee
- Fox Point - Bayside LX Club; programs for seniors in North Shore; annual dues; programs have been held at Dunwood School
- Village of Brown Deer Senior Citizen Programs through the Brown Deer Park and Recreation Department:
  - Senior Citizens Club: age 55 and over; annual; card games, classes, events, tours and travel
  - Senior Exercise: Age 55 and over at Trinity Community Church
- Activities, events and involvement through:
  - Shorewood Historical Society
  - Shorewood Men's Club
  - Shorewood Women's Club

**Resource Information, Referrals and Assistance:** SRC is unique in the North Shore for directly providing resource information, referrals and assistance to older adults.

Resource information is available through other organizations and online, but the SRC planning focus groups and interviewees provided positive feedback about SRC's ability to provide specific and personal service. It was noted that older adults or caretakers often do research online but the information can be confusing and SRC is invaluable in helping sort it out and weigh options.

Other sources for resource information and/or referrals include:

- North Shore Health Department
  - Works closely with SRC and North Shore Fire Department
- North Shore Fire Department
  - Home Safety Assessments
  - Knox Box installations
- Milwaukee County Department on Aging, Aging Resource Center

- Milwaukee County Department on Aging, Online Information and Referral Directory
- No senior center or resource services are identified for: Whitefish Bay, Glendale, River Hills, Fox Point, or Bayside
- Village of Brown Deer Senior Meal Program held in the Lois and Tom Dolan Community Center; open to seniors age 60 and over
- Interfaith Older Adult Programs:
  - Online links to organizations to help older adults and those who care for them and a phone contact if help is needed finding resources
  - Senior Ambassador volunteers, trained on services and resources, who can reach out to older adults in community settings and can meet one-on-one to discuss resource options
- Impact 2-1-1 has an online database of services in southeastern Wisconsin
- Senior Resources, a Wisconsin-based organization, publishes directories of housing and health care options and provides an online search tool for services
- Wisconsin Department of Health Services, Long Term Care and Support provides descriptions of services and links to resources
- Many online resources are available through searches for specific topics

## **What do we know about older adults in Shorewood?**

### **A Current Demographic Snapshot**

Compared to other North Shore communities, except for Whitefish Bay, Shorewood has a younger population (APPENDIX B, TABLE 1.) but is still home to many older adults. Because of its proximity to the University of Wisconsin-Milwaukee and convenience to the Milwaukee downtown, it has been attractive to young professionals. Its excellent schools also attract families. Also, several other surrounding communities have more Community-based Residential Facilities (CBRFs), where more especially frailer older adults live, than Shorewood.

The percent of Shorewood's population 62 years and over is much the same as the State of Wisconsin's, except that Shorewood has a smaller proportion of people 85 years and over. Again, this is likely because it did not have a CBRF until HarborChase, an assisted living and memory care facility, opened in 2015.

The Village of Shorewood Planning and Development Department provided estimates from The Nielsen Company which show the following in terms of the 2016 estimated population of Shorewood:

- Age 55 and over: 3,801 residents or 29% of the total population
- Age 65 and over: 2,039 residents or 15% of the total population
- Age 85 and over: 245 residents or almost 2% of the population (APPENDIX B, TABLE 2.)

The Nielsen data for 2016 further show that, of those age 65 and over, 41% are male and 59% are female; while for those age 85 and over, 28% are male and 72% are female. (APPENDIX B, TABLE 4.) Most of the older adults report their race as White: 95% of the population age 65 and over and 97% of the population age 85 and over. Those reporting their race as other than White, primarily report as Hispanic or Latino, Black or African American or Asian.

### **Demographic Projections - Shorewood's older adult population is increasing**

Over the next five to ten years, it's really all about Baby Boomers - those born between 1946 and 1964.

They started turning 60 in 2006 and in 2016 the older of the Boomers are beginning their 70's. In 10 years, in 2026, they will start turning 80 and all the Baby Boomers will then be over 60 years of age.

According to population estimates and projections compiled for the Village of Shorewood by The Nielsen Company, adults age 55 and over are projected to be 30% of the total population in 2021. (APPENDIX B, TABLE 2.)

Adults age 65 and over are projected to increase by just over 17% from 2,039 in 2016 to 2,390 in 2021 while the under age 65 population of Shorewood is projected to decrease by over two percent from 11,235 in 2016 to 10,980 in 2021.

The proportion of adults age 65 and over of the total population will increase from a little over 15 percent (2016) to almost 18 percent of the total population in 2021. By 2021, almost 1 in 3 residents will be age 55 and over and almost 1 in 5 age 65 and over.

Adults age 85 and over, however, are projected to decrease in Shorewood by 2021 in The Nielsen Company data. This is considered to be because older, frailer, adults are not aging in place in their homes or in the community but are moving to other communities, often to residential facilities.

Shorewood's *Community Vision 2025 Report* noted "Although the percentage of WI and US adults aged 80+ should continue to grow, Shorewood's share should continue to decrease unless a senior housing project brings in more frail elderly." With the 2015 opening HarborChase, therefore, future demographic projections for those age 85 and over may be increased.

Life expectancy at age 65 has also increased. The U.S. Census life expectancy at age 65 was 15.2 years in 1972 and was 19.1 years in 2010. The U.S. Department of Health and Human Services, Administration on Aging's *A Profile of Older American's* states "In 2013, persons reaching age 65 had a average life expectancy of an additional 19.3 years (20.5 years for females and 17.9 years for males)." Concerns were raised, however, that increasing life expectancy trends may change due to current obesity levels.

Information available from The Nielsen Company data did not project past 2021. Data compiled by the U.S. Department of Health and Human Services, Administration on Aging projects to 2030 (APPENDIX B, TABLE 3.). This information reveals that, in Wisconsin, from 2015 to 2030 the number of persons 60 and over will increase by 33 percent. Just looking at those 65 and over, the increase is 49 percent and for those 85 and over it is a 30 percent increase. The same data project that the percent of older adults to the total population will also increase.

If Shorewood follows the projections for Wisconsin, the Village can expect that 21% of its total population will be older adults age 65 and over in 2030.

Most of Shorewood's older adults now, and projected in the future, are women. (APPENDIX B, TABLE 4.) Of those age 65 and over, 59% are women in the 2016 estimated population and 58% projected for 2021. For those age 85 and over, almost three-fourths are women (72% in the 2016 estimates and 70% in the 2021 projections.

ESRI Community Profile data for the Village of Shorewood, provided by the Planning and

Development Department, Village of Shorewood, show a trend from 2010 to 2018 of slowly increasing ethnic diversity that is expected to continue. The percentage of the total population who identify as "White only" will decrease slightly from 88% in 2010 to 86% in 2018.

Although Shorewood has a somewhat younger population and currently a smaller percent of residents who are age 85 and over than other North Shore Communities, the number of older adults is considerable for a small village and is expected to increase over the next 15 years. Whether the Village is ready or not, clearly the older adult population is increasing.

### **Additional profile of Shorewood's older adults: Poverty, living alone, education, language**

According to information from the U.S. Census, 2010-2014 Community Survey 5-Year Estimates and U.S. Census, *QuickFacts*, Shorewood has a number of older adults who live alone and some report income below poverty.

In Shorewood, almost one quarter (22%) of the total households (1,389 of 6,221) include one or more people 65 years and over (2014 estimates). For almost 13% (781) of total households in Shorewood, the householder is 65 years and over and lives alone. This percent is higher than Wisconsin where 10% of total households have a householder 65 years and over who live alone.

Median household income in Shorewood was \$63,550 compared to Wisconsin's \$52,738 (both in 2014 dollars). Despite its relative affluence, Shorewood does have some older residents with income below poverty level. In Shorewood, according to 2014 estimates, 11.4% of all people had income in the past twelve months below the poverty level and, of those, 15.6% were age 65 and over. In Wisconsin 13.3% of all people had income below poverty level but, of those, only 7.7% were age 65 and over.

Shorewood's older adults are more highly educated than Wisconsin as a whole and most of the North Shore communities. Of those 65 years and over in Shorewood, over half (58.3%) have a Bachelor's degree or higher. Only Fox Point has a slightly higher percent (58.8%). (2014 estimates)

The *Shorewood Older Adult Community Survey 2007 Summary Report* includes data from the 2000 U.S. Census and notes that a higher proportion of Shorewood's older adult population identify as non-English-speaking. "In Shorewood (18% of the older adult population identify themselves as not speaking English very well) in comparison to Whitefish Bay older adults (2.4%) and Milwaukee County older adults (4.6%)."

### **What do we know about the needs of older adults - and Shorewood's older adults?**

To understand the need of older adults and specifically those in Shorewood, three types of information were reviewed: available national studies and reports, previous Shorewood surveys and planning efforts and the input from the planning focus groups and interviews. From this analysis some themes emerged:

- Older adults want to remain in their home and community as long as possible and as actively as possible;
- Many older adults have chronic conditions and limitations (many because of dementia); and
- Many older adults need and will need help and support.

### **Communities can do more**

The 2015 United States of Aging Survey conducted by the National Association of Area Agencies on Aging (n4a), The National Council on Aging (NCOA) and UnitedHealthcare examined older American's (age 60 years and older) perspectives on aging and what communities can do to better support an increasing, longer-living senior population. Some of their findings:

- "Older adults are looking to their communities for support as they age so they can continue living in their homes and neighborhoods as long as possible. A majority of older adults have not changed residences in more than 20 years (58 percent), and 75 percent say they intend to live in their current home for the rest of their lives."
- "Both older adults and professionals who work with them would like to see services that would help older Americans with home modifications and repairs (62 percent and 97 percent, respectively)."
- "Although older adults and professionals agree their communities offer seniors a good quality of life (79 percent and 92 percent, respectively), fewer than half of older adults (47 percent, down from 54 percent in 2014 and 49 percent in 2013) and professionals (37 percent) say their community is doing enough to prepare for the need of retiring Baby Boomers."
- The Survey results noted that top concerns of older adults were: maintaining their physical health, losing their memory and maintaining their mental health. The professionals surveyed said that their top concerns for older adults were protection from financial scams, access to affordable housing and losing their memory.
- "To stay mentally sharp, older adults and professionals agree on exercising and eating healthy, but older adults say #1 is keeping a positive attitude, and professionals stress the importance of keeping active socially."

### **Many older adults have disabilities or chronic conditions**

U.S. Department of Health and Human Services, Administration on Aging's *A Profile of Older American's* compiled key statistics on older Americans in key subject areas. Their profile notes the following:

- In 2012, "33% of community-resident Medicare beneficiaries age 65+ reported difficulty in performing one or more ADLs," activities of daily living which include bathing, dressing, eating and getting around the house. "An additional 12% reported difficulties with one or more IADLs," which are instrumental activities of daily living and include preparing meals, shopping, managing money, using the phone, doing housework, transportation etc.
- "Some type of disability (i.e., difficulty in hearing, vision, cognition, ambulation, self-care, or independent living) was reported by 36 % of people age 65 and over in 2013."
- "Most older persons have at least one chronic condition and many have multiple conditions. In 2011-2013, the most frequently occurring conditions among older persons were: diagnosed arthritis (49%), all types of heart disease (31%), any cancer (25%), diagnosed diabetes (21% in 2009-2012), and hypertension (high blood pressure or taking antihypertensive medication) (71 percent in 2009-2012)."
- Consistent with these data, the U.S. Census Bureau, 2010-2014 American Community Survey 5

Year Estimates, had data showing that over one third (34.5%) of the residents of Shorewood 65 years and over report having a disability.

### **Many have not saved enough for health and long-term care expenses**

A recent New York Times article (3/6/16) said it clearly: "Longer lives, rising costs and limits on what Medicare will cover have increased the amount people must save to ensure they can pay for health care in retirement." Studies show that many people have not saved enough for medical expenses, which rise with age, and long-term care. There is a concern that retirees will outlive their savings.

The article notes that Fidelity estimates that a couple who retires at 65 will spend \$245,000 for health care costs during retirement while the Employee Benefit Research Institute suggests that \$392,000 should be saved by age 65 for health care.

### **There won't be enough caregivers**

A study published by AARP looking at the future availability of caregivers concluded that "the supply of family caregivers is unlikely to keep pace with demand to assist the growing number of frail older people in the future." It states that the caregiver support ratio for people in the high-risk years of 80-plus will decline sharply from 7 potential caregivers for every 1 person age 80 and over in 2010 to 4 to 1 in 2030 when Boomers will be in the high-risk years of later life.

The study includes data showing that, in Wisconsin, the Support Ratio declines over time periods: 6.7 in 2010, 4.0 in 2030 and 2.9 in 2050.

### **Community Barriers to aging in place**

Considering Shorewood's efforts to be a vibrant, livable community for all ages, the common barriers to aging in place highlight needs for SRC's future planning.

In *A Blueprint for Action: Developing a Liveable Community for All Ages* (2007) MetLife, Partners for Livable Communities and the National Association of Area Agencies on Aging listed the most common barriers to aging in place:

- Lack of affordable and appropriate housing options
- Few opportunities for walking, bicycling or other forms of physical activity
- Inadequate mobility options
- Limited information about available health and supportive services in their community
- Concerns about the safety and security of the community
- Limited opportunities for meaningful and challenging volunteer service

In 2013 the MetLife Mature Market Institute and Stanford Center on Longevity developed *Liveable Community Indicators for Sustainable Aging in Place* as a way for communities to examine the needs of their aging population. These indicators echo the barriers identified in the 2007 *Blueprint* and therefore what is needed for sustainable aging in place.

### **Increasing numbers of people with Alzheimer's Disease and Other Dementias**

According to the Alzheimer's Association, of American's age 65 and over, 1 in 9 (11%) has Alzheimer's

disease. The incidence of developing it increases with age and for those age 85 and over, one third have the disease. Other data from the Alzheimer's Association 2016 *Facts and Figures* report, indicate that 14% of people age 71 and over have some form of dementia.

In terms of the future, the Alzheimer's Association report reminds us that the number of Americans surviving into their 90s and beyond is expected to increase. It notes that the Baby Boom generation is now reaching ages when the risk for Alzheimer's and other dementias is elevated and, as the number of older adults grows rapidly, "so too will the numbers of new and existing cases of Alzheimer's disease."

Using the Alzheimer's Association statistics and the Shorewood's demographics we can estimate that there are 224 people age 65 and over in Shorewood who have dementia in 2016. By 2021 those estimates could increase to an estimated 263 people age 65 and over. For a small community these numbers can have a social and economic impact.

### **Needs of the Baby Boomers**

There appear to be two groups of Baby Boomers: those active and financially secure and those who face economic hardship and increasing chronic diseases and disabilities. A number of sources were reviewed to see what could be learned about the needs of Boomers and if there are any differences from the needs of older adults who were born before the Baby Boom.

According to a series of articles by various researchers and authors in *Aging in America*, compiled by H. W. Wilson, 2014, the Baby Boomers present some challenges for communities:

- Baby Boomers are having fewer children and are more likely to have been divorced than previous generations which means that "elderly baby boomers are more likely to live alone and have fewer children to help provide extended care."
- Although Baby Boomers are overall active and have a "youthful mindset," many Baby Boomers have issues which affect, and will affect, them and their communities:
  - "An increasing incidence of chronic disease in this population, growing financial burdens on these federal programs (*Social Security and Medicare*), the declining number of primary care physicians and geriatric specialists in America, and the disappearance of pensions for many as a result of the economic crisis threaten this generation's 'golden' years."
  - "Nearly two-thirds" of the Baby Boomers have "at least one chronic health condition."
  - "Despite their longer life expectancy over previous generations, US baby boomers have higher rates of chronic disease, more disability, and lower self-rated health than members of the previous generation at the same age."
  - Baby boomers have increasing rates of diabetes, high blood pressure and obesity.
- Economically many Baby Boomers have more work productivity and invest wealth into the overall economy. They have encore careers and work because they want to. However:
  - A sizable group has no assets and is retiring later and with financial worries; and
  - Some are supporting children and grandchildren.

The MetLife Mature Market Institute has been studying the Baby Boomer cohort for several years, surveying a sample of people born in 1946. Their most recent study (2012) had several interesting findings about the respondents' status and perceptions about the future. Most Boomers surveyed report good to excellent health, although "two in 10 report being in worse health" than in 2008.

Home ownership increased from the 2008 survey from 85% to 93%. The majority of homeowners

(83%) do not plan to move.

One in seven were providing regular care to a parent or older relative helping with shopping, chores, meals or transportation. One in five Boomer parents report that they have children living with them and 9% of the grandparents report that they have grandchildren living with them.

## **What can we learn from previous surveys about older adults in Shorewood?**

**2007 Survey of older adults and how they view Shorewood.** A Shorewood Older Adult Community Survey 2007 was conducted as part of the Connecting Caring Communities Partnership under the direction of Interfaith Older Adult Programs. Adults age 55 and over were questioned in a random sample survey to gather information on behalf of the ESAB.

The *Shorewood Older Adult Community Survey 2007 Summary Report* summarized the findings noting that for the most part Shorewood's older adults are doing relatively well though there were "areas of concern."

The Summary Report identified "areas for future discussion:"

- " Interventions for low-income older adults with health issues
- Ways to reach isolated older adults, and others in need of services
- Support for caregivers as well as for those being cared for
- Financial counseling and long-term care planning
- Providing information about available programs and services to family and friends, health care providers and via the internet; ensuring that information is also readily accessible for Shorewood's non-English speaking population
- Opportunities for volunteerism or greater social interaction."

Specifically the Summary Report conveyed the following results from the survey responses which help expand our understanding of Shorewood older adults needs.

Of the respondents:

- 20% reported their health was fair or poor
- 23% indicated they felt physically unfit in the past month
- 19% reported they were not hopeful about the future
- 7% reported they had fallen and injured themselves at home in the past 12 months
- 18% had attended a senior center
- 19% would like to do more social activities. "This group is primarily comprised of people who are not married, who rent their homes, and are over the age of 65."
- 31% volunteered for some type of organization in the past week
- 5% reported they "were caring for someone who may need care including dressing, bathing, eating, financial work or household chores."
- 8% reported it was "very or somewhat difficult to arrange transportation to social activities/visit others or do routine shopping;"
- 7% reported it was "very or somewhat difficult to arrange transportation to medical or dental appointments."
- 85% indicated they turn to "family and friends" for information
- 14 % said they would turn to the Shorewood Health Department for information and 7% said to

## SRC

- 61% of respondents said they have internet access at home. Of those who have internet access at home, 76% use it every day or nearly every day."
- 68% reported "it is most important or very important to live in their current residence as they grow older; this is equally true for renters and homeowners."

The Older Adult Community Survey 2007 Summary Report also notes:

"While most Shorewood older adults own their own home, a number of residents live in apartment buildings scattered throughout the Village, in duplexes, or in the River Park apartments, consisting of 427 units of federally-subsidized housing for low-income and disabled people. Roughly half (52.3%) of all Shorewood residents age 55 and over live in renter-occupied housing, which is slightly higher than the proportion of Whitefish Bay older adults (14.7%)."

**2010 Senior Housing Survey.** To seek guidance about new housing development in Shorewood and support needed to help older adults remain in their homes, the Village of Shorewood Community Development Authority (CDA) in 2010 conducted a mail-in survey of a sample of adults age 55 and over. Survey results were reported in the *2010 Village of Shorewood Senior Housing Survey Report* (August 10, 2010).

The Survey was initiated because of the efforts of the Shorewood Connects partnership and Shorewood's interest in looking at how it could become a more "livable community for all ages."

The Report notes that the respondents were representative of Shorewood's older adults except for those in the 75 and over age group which was under-represented. Most of the respondents were homeowners (73%).

Some of the conclusions and results from the survey, to help further reveal older adults views on living in Shorewood, are summarized below:

- Most Shorewood residents prefer to stay where they are as they grow older.
- Some type of referral service for reliable home maintenance contractors would be helpful.
- Housing options, which had age-friendly features and were affordable, would influence the decision of some to remain in Shorewood.
- There is interest in increasing programming for exercise/fitness, technology, and discussion groups.

Since the survey results have been released some efforts have been made to address the findings. HarborChase of Shorewood, an Assisted Living and Memory Care facility opened at the end of 2015. An active senior living complex, developed by Sherman Associates, is planned to open possibly later in 2016. Changes have been made in SRC programming. Similar issues, however, were echoed in interviews and focus groups as part of this SRC Strategic Planning process.

**2013 Resident Survey.** The Village of Shorewood conducted an on-line survey of residents in 2013. The survey was community-wide in scope and did not focus on older adults. Of interest to this planning process, however, the majority of respondents indicated they had no interaction with or no opinion regarding the SRC, but, for those who did, most rated its customer service and service delivery highly.

**Shorewood Vision 2025, 2013-14 Strategic Planning Process Final Report.** The results of a Village-wide visioning process had several findings of interest to this planning process. The number of active older adults who moved into Shorewood increased since an earlier 2005 visioning effort. Since the 55 - 64 age group is expected to increase, the 2025 report adds, "Shorewood may be able to capitalize on the vitality this group would bring."

The Vision Report included insights related to Shorewood's older adults from focus group feedback. Older adults who moved to Shorewood "loved their places, whether they were high end or subsidized renters." Some older homeowners noted they were getting help to stay in their homes and others indicated they may need to move or get help in the future.

The focus group of "Seniors" included more duplex and apartment dwellers than homeowners. Owners of single family homes "were planning to move only when they have to and getting help from family or contractors to do physically difficult work." Participants were "enthusiastic supporters of the Senior Center and its director and enjoyed and used the library." They also had recommendations for improving pedestrian safety. Another focus group "supported and recommended planning for seniors to 'age in place'."

According to the Report, 75% of Shorewood's housing stock was built in or before 1939. Older housing, as noted in national reports about aging in place and senior-friendly communities, is more likely to require more maintenance and not have home modifications helpful for aging safely at home.

**City of Wauwatosa 2015 Senior Assessment.** In 2015 The City of Wauwatosa Senior Commission in partnership with The University of Wisconsin-Milwaukee Institute for Urban Health Partnerships and the City of Wauwatosa Health Department gathered information from a sample of residents age 55 and over. Since it is so recent, the report *Adding Life to Years, City of Wauwatosa 2015 Senior Assessment* can perhaps also offer some insights about older adults in Shorewood.

Consistent with results of previous Shorewood surveys, respondents to the survey in Wauwatosa reported that "making major home repairs or modifications" was a serious problem and the report recommended that efforts be made to "address the need for assistance for seniors for home repairs and modifications."

The older adults surveyed noted "the importance of having people in the neighborhood whom they could contact for assistance." Other needs identified included: improved transportation, communication of available resources and opportunities for intergenerational community engagement.

**Area Plan for Milwaukee County.** After its extensive public input process, the Milwaukee County Department on Aging's *Milwaukee County Area Plan for Older People 2013-2015* included three local goals which echo what was heard in this planning process and in previous surveys and information:

1. "Home Repair and Chore service: Repeatedly older people told us an impediment to their remaining independent in their homes was the availability and reliability of the repair and upkeep needed to age in place."
2. Improved "Communication with older people and their families about Aging Programs and Services" since there is a "lack of knowledge about existing resources and services."
3. "Opportunities for Social Engagement" for seniors including "recreation, exercise, education,

and social engagement."

## What did we learn from SRC Strategic Planning process focus groups, interviews and ESAB planning deliberations?

Input from SRC planning process stakeholder interviews, focus groups and ESAB planning deliberations provided insights about SRC services and older adult needs. A summary of the feedback regarding needs is outlined below.

### An outline of the older adults needs, concerns and issues shared through the SRC strategic planning process

"People have a tough time knowing what they need until they need it."

- Resources
  - Older adults, caregivers and adult children need knowledge of resources SRC has available
  - Resources can be accessible online but still need a person to talk to
  - SRC should continually outreach about resource availability so in a crisis older adults or caregivers immediately know where to go for help
  - Milwaukee County's Aging Resource Center is viewed as not always helpful

"Often a life event precipitates the need for an older adult to need more services from their community."

- Support to stay in homes safely
  - Want to stay in Shorewood
  - Help with home modification, repair, upkeep
  - Need neighbors helping neighbors (but neighborhoods changing)
  - Need to be comfortable calling someone for help
  - Lack of affordable housing options for older adults who want to downsize but remain in Shorewood
  - Affordable help around house; with cleaning house, chores
  - It is not always the best option for some to remain in their homes and "age in place"

"People have trouble finding trustworthy contractors for small jobs."

- Getting around
  - Transportation
  - Personal safety
  - Pedestrian safety
  - Bus stops/ shelters
  - Ease of walking; cross-walks, clear curb sides

"We need affordable homes for people like us in Shorewood."

"When you can't drive your freedom is lost."

- Economic security
  - Affordable housing
  - Cost of home repair and upkeep
  - Cost of health care
  - Understanding and navigating the health care and long-term care systems
  - Lack of planning ahead; estate and financial planning
  
- Isolation
  - Many older adults live alone
  - Family not in area
  - Some isolate by choice
  - Often it is an issue after someone is no longer able to drive
  - Isolated home owners
  - For isolated sometimes there are issues related to: home and personal hygiene, failure to thrive, ability to pay heat & utilities
  - Loneliness
  
- Health Concerns
  - Many older adults have at least one chronic condition; many have more than one
  - Some people have complicated situations; perhaps need public care management support
  - Expected increase in the number of people with dementia
  - Falls
  - Emergency preparedness: medications, early awareness of conditions, home access, alert systems,
  - Health maintenance
  - Need "formal" connection systems (hospitals, doctors' offices, rehab facilities)
  
- Caregiving
  - Fewer family members & others will be available to provide caregiving
  - Affordable caregiving; "Someone affordable to take care of you when you can't"
  - Don't know resources - usually seek after crisis
  - Need help navigating the long-term care system
  
- Discomfort with technology and digital dis-connectedness
  
- Respect: "Don't want to be treated like a child."
  
- Convenient opportunities to be active and engaged
  - "When you lose your spouse, family or friends, that's when you look for social contacts."
  
- Baby Boomers
  - The large group of them is getting older

"There needs to be more recognition that some people in Shorewood are struggling."

"For so many elders in Shorewood, their kids are spread all over the country."

"Who will take care of me when I am old."

- More active, tech savvy, don't consider themselves "senior"
- There are two general groups: those active and financially secure and those less well off with health problems
- As they age they will need what current older, older adults need ("They just don't know it yet.")

## **What are some future trends for senior centers?**

When researching future trends for senior centers the question usually addressed is not so much what innovative out-of-the-box model is envisioned for the future, but more how to make senior centers "cool" and attractive to Baby Boomers. There is a lot of focus on having more active and attractive programming.

A recent webinar from The National Resource Center on Nutrition and Aging "Reimagining your Senior Center" focused on new locations for delivery of services, securing additional funding, seeking new partners, being flexible, marketing, advocacy, and volunteer programs.

A 2015 article in Forbes got senior centers talking with an article "Why We Need to Get Rid of Senior Centers." It suggests turning traditional centers into energetic community centers for all ages. This, noted in other articles, requires fiscal resources and a community-wide effort with many partners. There are also models for centers with more of a country club atmosphere with libraries, media rooms and exercise centers.

Many centers, an AARP Bulletin notes, are becoming "one-stop health, social, recreational and life-long learning resource centers." A Manhattan Center for Balanced Living is highlighted which hosts wine tastings, dances, workshops and discussions. In Chicago, the Mathers-More Than a Café has been successful. They have restaurants which also offer classes, lectures, and social connections.

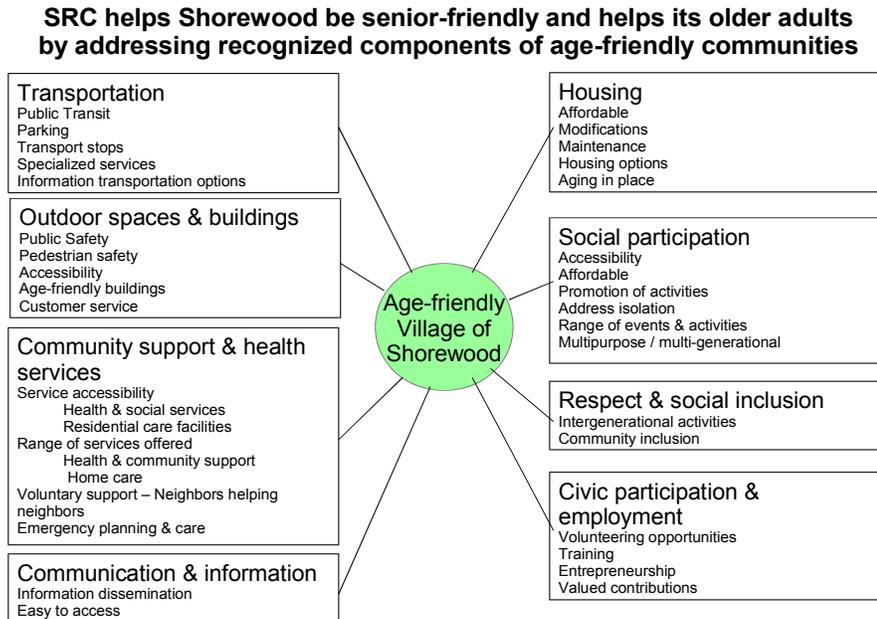
This Plan incorporates many aspects of these new national models and best practices. Whatever the models, however, - for cafes with espresso bars or community centers with kayaking excursions - the Baby Boomers will eventually all retire and there is consensus they will need opportunities for social engagement, for volunteering, to improve their health and wellness and to connect to services and resources. It doesn't appear that the need for a community to have some kind of focus on services for older adults will be going away.

## **What is SRC's Direction for the Future?**

Looking at the information revealed in this planning process and ahead the next 5 years and beyond, the Senior Resource Center considered its vision for the future. SRC sees its future in providing services and resources to older adults to help them age well in place and "in community" and, by addressing some of the recognized components of age-friendly communities (See chart below), help Shorewood further succeed in being age-friendly.

In supporting age-friendliness, SRC is not alone, Different entities, like the North Shore Health Department, Shorewood Recreation Department, Shorewood Public Library and others, address different components of age-friendly communities. Shorewood Connects also has worked to

incorporate an awareness of "senior-friendly," building strong relationships with Shorewood's School District, the Community Development Authority, the Business Improvement District and neighborhoods.



Components of age-friendly communities from *Global Age-Friendly Cities: A Guide 2007*, World Health Organization

Why have a plan with a vision of helping older adults age well "in community" and support enhancing age-friendliness of Shorewood? It addresses older adult needs and it's good for the whole community.

“What would Shorewood be like if we just had a bunch of older lumps just sitting around.” *SRC participant*

There seems to be a consensus that vibrant older adults contribute to a vibrant community. The MetLife Report, *Livable Community Indicators for Sustainable Aging in Place* (2013) notes that "aging in place is the ability to remain in one's own home or community in spite of potential changes in health and functioning" and that aging in place benefits a community's older adults and their families, communities and government. It benefits other residents, businesses and organizations. Often, "older adults who chose to relocate after retirement are younger, healthier and wealthier" and efforts to help aging in place may encourage these older adults to remain in the community, contributing to it.

Throughout the planning process, people talked about the benefits of a community that focuses on keeping and serving its older population. People noted that multi-generational communities are usually safer since there are "eyes on the ground." Mutual support systems can exist with older adults helping families with children, since many don't have family supports close by, and younger families helping older residents.

There can be an economic benefit since older adults travel shorter distances and patronize local businesses. If older adults are informed, engaged, and physically fit as possible, there can be fewer calls, and less expense, to the Shorewood Police Department, North Shore Fire Department or North Shore Health Department. As the 2010 Shorewood Housing Survey report noted: "communities like Shorewood benefit from connections with older adults in terms of historical perspective, economic impact, residential stability, and older adults' willingness to give back in some way."

Therefore the Shorewood Senior Resource Center's 2017-2021 Strategic Plan supports the SRC vision and mission to benefit Shorewood's older adults and the entire community. The five-year goals and objectives, once implemented, position SRC to better serve an increasing number of older adults and build momentum toward the future.

**SRC Vision:**

To help build a vibrant age-friendly Village by supporting older adults to age well "in community."

**SRC Mission:**

The Senior Resource Center promotes safe, healthy and enriching lifestyles for Shorewood residents age 60 and over.

## **Elder Services Advisory Board**

### Members:

Andrew Alden, Chairperson

Fran Bauer

Alex Hill

Rene Gratz

Niki Skinner

Melinda Vernon

### Staff/ Others

Elizabeth Price, Senior Resource Center Coordinator

Kathleen Platt, RN, North Shore Health Department

Priscilla Sharpless, Resident

John Hein, Resident

Sue Kelley, Shorewood Connects Facilitator

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## APPENDIX A.

### Sampling of 2015 SRC Participants

**Participants**, age 60+, from April 1 through the first part of October who completed a CDBG form

Male participants	137	22%
Female participants	482	78%
Total participants	619	

**Age** – For those completing “age” line on Survey (477 women, 130 men)

	60 – 69	70 – 79	80 – 89	90 – 99	
Male participants	28 (21%)	58 (45%)	36 (28%)	8 (6%)	
Female participants	131 (27%)	211 (44%)	116 (24%)	19 (4%)	(Total 99% due to rounding)

**Residency** – Percent for those completing “City/Village” line on survey (450 women, 131 men)

Male participants	
Residents	51%
Non-residents	49%
Female participants	
Residents	55%
Non-residents	45%

#### Race

As self-reported	Male Participants	Female Participants		
White, non-Hispanic	131	460	591	95.5%
Hispanic	0	2		
American Indian/ Alaskan Native	0	2		
Asian	1	2		
Black/ African American	3	0		
Native Hawaiian/Other Pacific Islander	0	1		
American Indian/ Alaskan Native & White	0	2		
Black/ African American & White	0	4		
Asian & White	1	2		
American Indian/ Alaskan Native & Black/ African American	0	1		
Other/ Multi-race	1	6		
Total participants who reported their race as other than White, non-Hispanic	6	22	28	4.5%

Note: To meet requirements of Community Development Block Grant (CDBG) funding, data are collected during a set period of time. A simple survey is distributed to participants to complete. Information for participants age 63 and over is required for CDBG. The above data include information from the few surveys completed by anyone age 60 to 63.

**APPENDIX B.  
Demographic Tables**

**APPENDIX B, TABLE 1. North Shore Communities Older Adult Population 2014 Estimate**

Community	Total Population	Population 62 years & over	Population 65 years & over	Population 85 years & over
Shorewood	13,245	2,256 (17%)	1,848 (14%)	183 (1.4%)
Whitefish Bay	14,132	2,210 (15.6%)	1,719 (12.2%)	322 (2.3%)
Glendale	12,893	3,173 (24.6%)	2,803 (21.7%)	619 (4.8%)
Fox Point	6,695	1,571 (23.5%)	1,302 (19.4%)	231 (3.5%)
Bayside	4,479	1,128 (25.2%)	954 (21.3%)	120 (2.7%)
Brown Deer	12,067	2,727 (22.6%)	2,182 (18.1%)	321 (2.7%)
River Hills	1,501	410 (27.3%)	331 (22.1%)	38 (2.5%)
Milwaukee County	953,401	139,362 (14.6%)	111,948 (11.7%)	18,489 (1.9%)
Wisconsin	5,724,692	1,022,367 (17.9%)	823,999 (14.4%)	122,791 (2.1%)

Source: U.S. Census Bureau, 2010-2014 American Community Survey 5 Year Estimates

**APPENDIX B, TABLE 2. Shorewood Older Adult Population 2010 to 2021  
Population Changes projected over the next Five Years**

	2010 Census Estimated Population		2016 Estimated Population		2021 Projected Population		Percent change from 2016 to 2021
	Population	Percent of total Population	Population	Percent of total Population	Population	Percent of total Population	
Total Population	13,162		13,274		13,370		0.72%
Age 0 – 64	11,441	86.92%	11,235	84.64%	10,980	82.12%	-2.27%
Age 55 – 64	1,745	13.26%	1,762	13.27%	1,664	12.45%	-5.56%
Age 65 – 74	871	6.62%	1,249	9.41%	1,497	11.20%	19.86%
Age 75 – 84	586	4.45%	545	4.11%	669	5.00%	22.75%
Age 85 and over	264	2.01%	245	1.85%	224	1.68%	-8.57%
Age 55 and over	3,466	26.33%	3,801	28.63%	4,054	30.32%	6.66%
Age 65 and over	1,721	13.08%	2,039	15.36%	2,390	17.88%	17.21%

Source: The Nielsen Company, 2015  
Pop-Facts Demographics by Age Race Sex  
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Report Generated November 9, 2015 4:34:55 PM EST  
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**APPENDIX B, TABLE 3. Projected Future Growth of the Older Population US and WI 2005 – 2030**

U.S. Department of Health and Human Services, Administration on Aging

	Census 2000	Projection 2005	Projection 2010	Projection 2015	Projection 2020	Projection 2025	Projection 2030	Percent increase from 2015 to 2030
<b>Age 60 and over</b>								
Number of persons 60 and over								
US	45,797,200	49,712,714	56,922,418	65,551,441	75,487,837	84,652,165	91,129,331	
Wisconsin	907,552	961,642	1,082,618	1,241,576	1,419,832	1,570,261	1,653,058	33%
Percent of persons 60 and older								
US	16.3%	16.8%	18.4%	20.3%	22.5%	24.2%	25.1%	
Wisconsin	16.9%	17.3%	18.9%	21.1%	23.6%	25.8%	26.9%	
<b>Age 65 and over</b>								
Number of persons 65 and over								
US	34,991,753	36,695,904	40,243,713	46,790,727	54,631,891	63,523,732	71,453,471	
Wisconsin	702,553	720,807	771,658	881,745	1,025,542	1,183,596	1,312,225	49%
Percent of persons 65 and older								
US	12.4%	12.4%	13.0%	14.5%	16.3%	18.2%	19.7%	
Wisconsin	13.1%	13.0%	13.5%	15.0%	17.1%	19.4%	21.3%	
<b>Age 85 and over</b>								
Number of persons 85 and over								
US	4,239,587	5,120,394	6,123,458	6,821,666	7,268,908	8,011,123	9,603,034	
Wisconsin	95,625	112,174	128,800	140,637	145,977	156,838	182,654	30%
Percent of persons 85 and older								
US	1.5%	1.7%	2.0%	2.1%	2.2%	2.3%	2.6%	
Wisconsin	1.8%	2.0%	2.2%	2.4%	2.4%	2.6%	3.0%	

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From Data compiled by the US Administration on Aging from U.S. Census Bureau, Population Division, Interim State Populations Projections, 2005

**APPENDIX B, TABLE 4. Shorewood Older Adult Population by Gender 2010 to 2021**  
**Population Changes projected over the next Five Years**

	2010 Census Estimated Population				2016 Estimated Population				2021 Projected Population						
	Population	Male	Percent of population in age group	Female	Percent of population in age group	Population	Male	Percent of population in age group	Female	Percent of population in age group	Population	Male	Percent of population in age group	Female	Percent of population in age group
Total Population	13,162					13,274					13,370				
Age 65 and over	1,721	682	39.63%	1,039	60.37%	2,039	844	41.39%	1,195	58.61%	2,390	1,002	41.92%	1,388	58.08%
Age 85 and over	264	73	27.65%	191	72.35%	245	68	27.76%	177	72.24%	224	67	29.91%	157	70.09%

Source: The Nielsen Company, 2015

Pop-Facts Demographics by Age Race Sex

Pop-Facts Premier 2016

Report Generated November 9, 2015 4:34:55 PM EST

Provided to SRC from Planning and Development Department, Village of Shorewood, 11/10/2015

## **APPENDIX C.**

### **SRC SWOT: Strengths, Weaknesses, Opportunities, Threats**

#### **Strengths:**

- Location: known, safe, comfortable, convenient, quiet, parking, multi-use space with library, health dept
- History of good service; universal positive feedback
- Current participants, active, engaged & supportive
- Current programs - holistic, variety
- Advisory board structure
- Funding support (tax levy and Benjamin Fund)
- Staff - positive feedback
- Programs affordable
- Resource help; personal service
- Volunteers
- Intergenerational efforts and Community Award (Shorewood Connects)
- Staff understands natural support system
- Unique in North Shore Community

#### **Weaknesses:**

- Perceptions: "senior;" for older, older adults, "a piddly coffee klatch," "just a social club"
- Programs do not attract Baby Boomers
- Non-residents, from communities with no senior center, seeking resource help
- Funding limited: some pressure not to increase tax levy; limited grant writing
- Restrictions on use of Benjamin Fund
- Limited staff resources
- Limited ability research resources and information and keep up to date
- Limited reach of marketing & outreach
- Business operations (data system, online registration, job description, etc.)
- Measurable objectives
- Web presence (for outreach and resource information and assistance)

#### **Opportunities:**

- Numbers of older adults & Baby Boomers coming
- Collaborations/ cooperation with others serving older adults
- Shorewood marketing/ outreach infrastructure in place
- Shorewood already has many key components of a senior-friendly city
- Police Dept possibly relocating - extra space may be available
- New School Superintendent
- Energy created from strategic planning process
- Upcoming older adults increasingly more internet, smart phone or social media savvy
- New technology (transportation, robotics, adaptive equipment, etc.)
- Some higher income residents
- Availability and close proximity of "gathering places" (coffee shops, pubs, restaurants)

**Threats:**

- Increasing numbers of older adults
- Increasing numbers of older adults with chronic conditions and dementia
- Increasing numbers of older adults with economic insecurity
- Funding not increasing at rate number of older adults is increasing
- Perception that Village is more supportive of Millennials
- Older housing in Shorewood
- Limited affordable, age-friendly housing options