



The Senior Center

Ashfield • Buckland • Shelburne

SENIOR CENTER EXPANSION COMMITTEE: JOINT BOARDS MEETING

Supported by Ashfield, Buckland & Shelburne

September 11, 2019

Agenda

- Call to Order and Introductions
- Meeting Overview and Goals
- Current Expansion Project Status Panel
- Funding and Budgeting Panel Discussion
- Ownership Panel Discussion
- Site and Design Panel Discussion
- Public Comment
- Possible Executive Session on Mountain Lodge of Masons Property
- Adjourn

NEED FOR A NEW / EXPANDED SENIOR CENTER

Need – Challenges and Support to Age in Place (1 of 3)

Population Shift

- According to the 2014 Aging in West County Report, prepared by the University of Massachusetts Boston Gerontology Institute:
- In 2010 the Towns of Ashfield, Buckland and Shelburne had a combined population of more than 5,500 residents, of whom more than **26%** were 60 and older.
- By 2030, nearly **47%** of residents in consortium towns will be age 60 and older, representing about 2,175 residents.

Need – Challenges and Support to Age in Place (2 of 3)

Senior Center

- Operating as a consortium of towns since 1987, the Senior Center is supported by funding from Ashfield, Buckland and Shelburne, plus grants, donations and funds from the Senior Center Foundation.
- In each of fiscal years 2018 and 2019, over 1,000 individuals participated in some way with Senior Center programs and services for a total of over 25,000 total units of participation.
- This includes diverse social, wellness and recreational activities, informational and enrichment programs and support for home care services, fuel assistance and housing support.
- Transportation by lift equipped vans service 9 local towns for medical, food shopping and social trips (over 3,000 trips last year.)
- 7 staff (5 are part time) and over 100 volunteers contribute their time and talents to provide these services and opportunities.

Need – Challenges and Support to Age in Place (3 of 3)

Recognizing the Main Issues

By 2014, it was clear the current facility, a rented and shared first floor in the Masonic Lodge was inadequate.

- only 1 toilet
- lack of privacy: for health, veteran and outreach services, walk through activity rooms and offices challenging privacy, acoustics and attention
- accessibility limited- narrow hallways, reception and copier in hallway, crowded rooms and offices
- need for additional program spaces to meet requests by residents

Improved and additional space is needed to resolve these basic dignity issues immediately, regardless of population fluctuations.

FUNDING AND BUDGETING OVERVIEW

Funding and Budgeting Overview

PROJECTED OPERATION COSTS

FY 2019 MUNICIPAL BUDGET

Personnel Costs \$ 123,800

Building/Site Costs \$12,600

Program Support Costs \$26,500

Total Operation Costs \$ 162,900
(3% Inflated Operation Costs \$ 188,800)

PROJECTED FY 2024 BUDGET

Personnel Costs \$ 191,100

Building/Site Costs \$ 40,400

Program Support Costs \$ 50,800

Total Operation Costs \$ 282,300

PROJECTED COST ASSESSMENTS FOR INDIVIDUAL TOWNS

(Costs for individual towns based on average percentage citizen usage by town)

Assume total operation costs are \$ 100,000

Ashfield 20% usage \$ 20,000

Buckland 30% usage \$ 30,000

Shelburne 50% usage \$ 50,000

Approximate Anticipated Capital Cost Funds by Sources

SEPT 11 2019

The following is a rough approximation of funds estimated to be raised from the various sources identified below.

Total from Member Towns	\$ 400,000 - \$ 800,000
State Block Grants (3 town application)	\$ 1,300,000
*State Appropriations	\$ 500,000 - \$ 1,000,000
Funds Raised by Foundation	<u>\$ 1,500,000 - \$ 4,000,000</u>
Total Anticipated Funds	\$ 3,700,000 - \$ 7,100,000
*FY2020 State Budget Appropriation	\$ 25,000.00

OWNERSHIP MODELS OVERVIEW

Ownership Model Overview (1 of 3)

CAPITAL APPORTIONMENT MODELS

9/11/19

\$1,000,000 Municipal Capital Contribution is used for illustrative purposes.

EQV Wealth Capacity Model

The data used in this calculation is taken from the Massachusetts Department of Revenue (DOR) website.

	3 town %	\$1,000,000 Capital contribution
Ashfield	34%	\$ 340,000
Buckland	31%	\$ 310,000
Shelburne	35%	\$ 350,000

Equal Apportionment Model - 1/3, 1/3, 1/3

Apportionment equally shared among the 3 member towns, previously used as the housing cost in our lease agreement.

Ashfield	33.3%	\$ 333,333.33
Buckland	33.3%	\$ 333,333.33
Shelburne	33.3%	\$ 333,333.33

5-year Average Usage Model

The use of the 5-year average usage formula is currently used to apportion operating expenses which directly reflects programs, activities, and services used by seniors.

Ashfield	18.1%	\$ 181,000
Buckland	31.8%	\$ 318,000
Shelburne	50.1%	\$ 501,000

Ownership Model Overview (2 of 3)

SENIOR CENTER OWNERSHIP OPTIONS

9/11/19

Options researched:

- **Multi-town ownership**
- **501(c)3**
- **501(c)2**
- **Single-town ownership**

Comparisons:

- **Authorizing authority**
- **Governance**
- **Operating Costs**
- **Capital Costs**
- **Pros**
- **Cons**

Ownership Model Overview (3 of 3)

SENIOR CENTER FOUNDATION OWNERSHIP

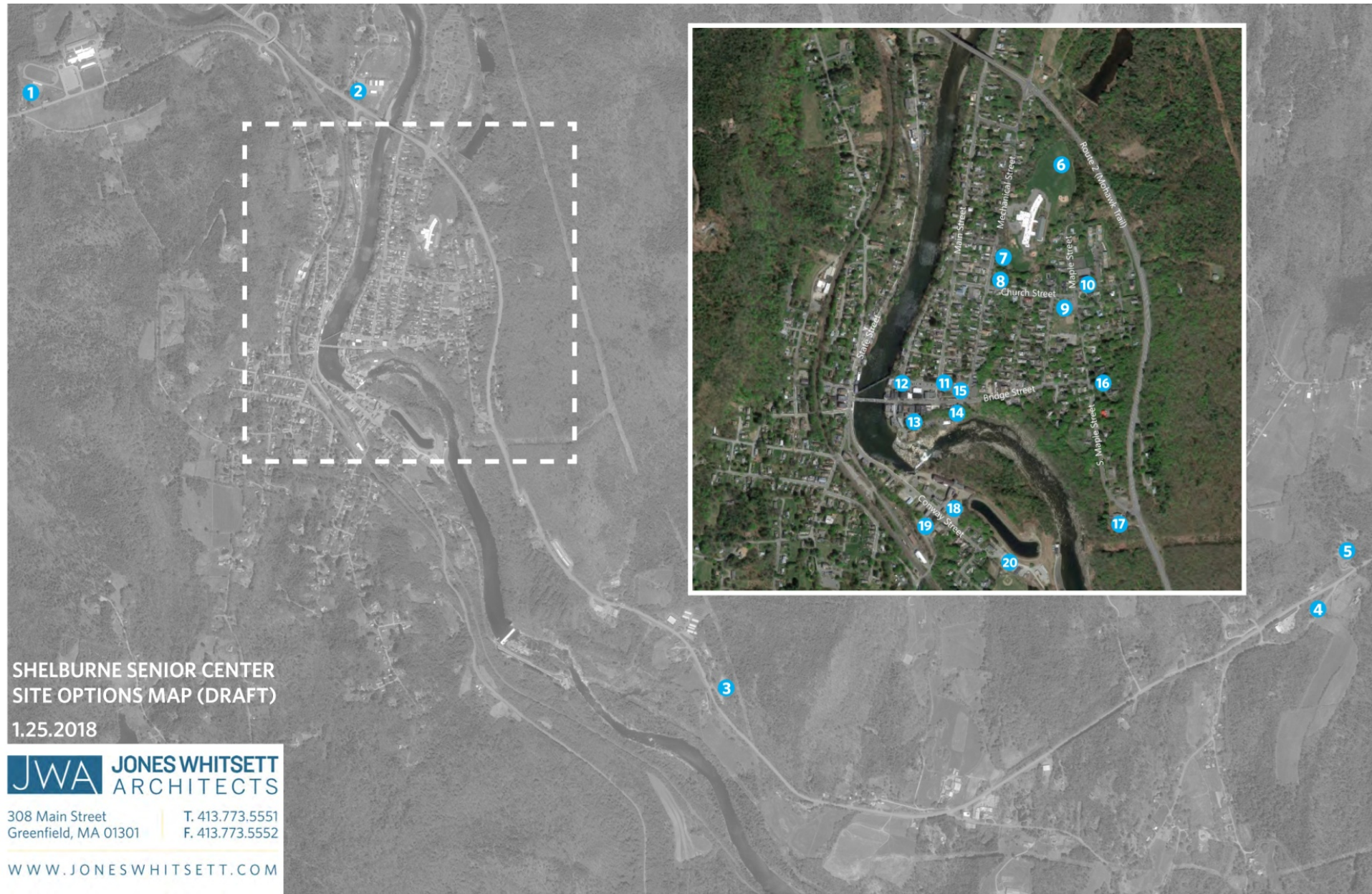
9/11/19

The Senior Center Foundation was established solely as the fund-raising arm of the Senior Center.

There are compelling reasons why the Foundation and its Board cannot and should not function as owner of a new or renovated Senior Center.

SITE AND DESIGN OVERVIEW

Sites Considered –for the Senior Center



SHELBURNE SENIOR CENTER
SITE OPTIONS MAP (DRAFT)

1.25.2018

JWA JONES WHITSETT
ARCHITECTS

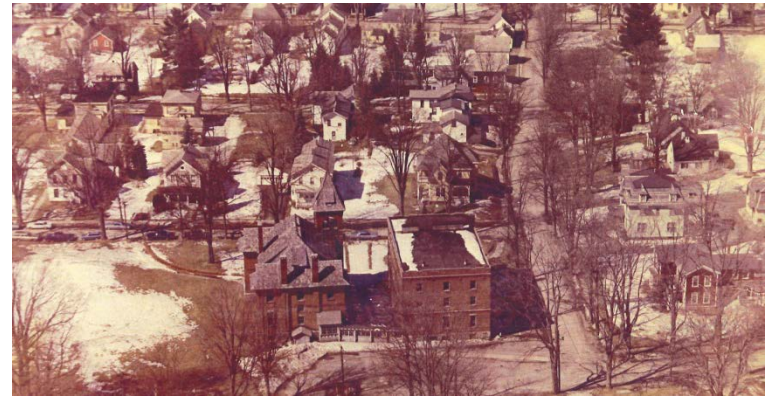
308 Main Street T. 413.773.5551
Greenfield, MA 01301 F. 413.773.5552

WWW.JONESWHITSETT.COM

Renovate Mole Hollow Candle on Deerfield Avenue



New Construction Adjacent to Arms Academy



Renovate and Expand Buckland Police Station on Conway Street



Renovated and Expand at Masonic Building



PLANNING COORDINATOR HIGHLIGHTS

SENIOR CENTER EXPANSION COMMITTEE PLANNING COORDINATOR

Planning Coordinator Highlights (page 1 of 2)

Highlights

9-11-19

General Description

- Provides a range of planning, administration and clerical functions.
- Works with Senior Center Director on administrative and clerical related tasks.
- Works with and at the direction of the Senior Center Expansion Committee by regularly communicating with key stakeholders, including but not limited to the following Senior Center Expansion and subcommittee chairs and municipal liaisons, the Senior Center Board, and Selectboards and Finance Committees of the member towns.
- Is an independent contractor.

Anticipated Deliverables on or before February 1, 2020

1. A recommendation of viable ownership models
2. A comprehensive “Apples-to-Apples” comparison of key sites
3. A schedule and facilitation of public forums on the elements of the Expansion Project
4. Prepare town meeting warrant article(s) relative to project status by Feb. 1, 2020

Planning Coordinator Highlights (page 2 of 2)

Hiring

- The Expansion Committee, the Senior Center Board (member town COA members), have reviewed twice and approved the description. The description is before the Shelburne Selectboard for their consideration.
- An RFP will be issued and respondents will be screened by Expansion Committee, Senior Center Board, and Senior Center Foundation representatives of the member towns. A recommendation will be made to the Shelburne Selectboard, the Sr. Center Consortium fiscal agent.
- The term of the contract is 6 months, with option to renew for 3 months.
- Salary range is a monthly rate based on 30-hour work week at \$30.00-\$45.00 per hour.
- Funding the position has been authorized by the Expansion Committee: \$25,000 from FY20 state appropriation, \$15,000 from municipal Expansion Committee funds; \$10,000 from the Senior Center Foundation is pending (meeting 9/13).

FUNDING AND BUDGETING PANEL DISCUSSION

Operating Cost Estimates (1 of 2)

PROJECTED NEW SENIOR CENTER ESTIMATED MUNICIPAL OPERATION EXPENSE BUDGET SEPT 11 19

Fy2019 Municipal Budget

Personnel

Director	43,200.00
Outreach Coordinator	23,700.00
Activities Coordinator	13,500.00
Act Assist.Coordinator	
Office Assist./Receptionist	4,800.00
Building Manager	
Sub. Staff	3,500.00
<i>Personnel Subtotal</i>	<i>88,700.00</i>

Benefits 35,100.00

Heat and Utilities

Heating Fuel	4,800.00
Electricity	6,300.00
Telephone	1,100.00
Sewer/Water	400.00

Heat and Utilities Subtotal 12,600.00

Projected (Fy2024) Municipal Budget

Including 3% yearly inflation factor

Personnel

Director	48,900.00
Outreach Coordinator	32,700.00
Activities Coordinator	18,000.00
Act Assist.Coordinator	13,700.00
Office Assist./Receptionist	14,200.00
Building Manager	9,100.00
Sub. Staff	4,000.00
<i>Personnel Subtotal</i>	<i>140,600.00</i>

Benefits 54,500.00

Heat and Utilities

Heating Fuel	15,700.00
Electricity	20,600.00
Telephone	2,100.00
Sewer/Water	2,000.00

Heat and Utilities Subtotal 40,400.00

Operating Cost Estimates (2 of 2)

FY 2019 Budget (continued)

Miscellaneous

Internet	1,300.00
Postage	600.00
Office Supplies	1,400.00
Computer/Equipment	1,000.00
Repairs/Replacement	1,800.00
Copier Payment/Printing	1,600.00
*Newsletter	
Memberships/Dues	900.00
Staff Training	800.00
Staff Travel	1,000.00
Subscriptions	300.00
Programing	2,000.00
*Transportation Expense	
Propane	1,100.00
Custodial/Snow Removal	4,300.00
Rent	8,100.00
Security/Inspections	300.00

Misc. Operat. Cost Subtotal 26,500.00

Total Operation Costs FY2019 162,900.00

Total Operation Costs FY2024 188,846.00

FY 2024 (Projected)

Miscellaneous

Internet	2,500.00
Postage	1,100.00
Office Supplies	2,300.00
Computer/Equipment	6,000.00
Repairs/Replacement	1,300.00
Copier Payment/Printing	2,300.00
*Newsletter	-
Memberships/Dues	1,700.00
Staff Training	1,300.00
Staff Travel	1,600.00
Subscriptions	700.00
Programing	3,100.00
*Transportation Expense	-
Propane	2,000.00
Custodial/Snow Removal	15,600.00
Rent	
Security/Inspections	3,000.00
Insurance	14,000.00

Misc. Operat. Cost Subtotal 58,500.00

Total Operation Costs 282,300.00

*covered by other sources

Approximate Operation Cost Assessments

APPROXIMATE SENIOR CENTER OPERATION COST ASSESSMENTS FOR INDIVIDUAL TOWNS SEPT 11 2019

The following is an approximation of individual town assessments based on an average percentage of citizen usage of the center by town.

Total Cost Assessment for All Towns	Ashfield Assessment (20% of total)	Buckland Assessment (30% of total)	Shelburne Assessment (50% of total)
\$ 150,000.00	\$ 30,000.00	\$ 45,000.00	\$ 75,000.00
\$ 175,000.00	\$ 35,000.00	\$ 52,500.00	\$ 87,500.00
\$ 200,000.00	\$ 40,000.00	\$ 60,000.00	\$ 100,000.00
\$ 225,000.00	\$ 45,000.00	\$ 67,500.00	\$ 112,500.00
\$ 250,000.00	\$ 50,000.00	\$ 75,000.00	\$ 125,000.00
\$ 275,000.00	\$ 55,000.00	\$ 82,500.00	\$ 137,500.00
\$ 300,000.00	\$ 60,000.00	\$ 90,000.00	\$ 150,000.00
\$ 325,000.00	\$ 65,000.00	\$ 97,500.00	\$ 162,500.00
\$ 350,000.00	\$ 70,000.00	\$ 105,000.00	\$ 175,000.00

Approximate Anticipated Capital Cost Funds by Sources

SEPT 11 2019

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OWNERSHIP PANEL DISCUSSION

CAPITAL APPORTIONMENT MODELS

9/11/19

Ownership Models –

Capital Apportionment Models

1. \$1 million is used for ease of calculation and comparison and is not a recommended or assumed municipal contribution.
2. The most current data would be applied at the time of a capital project.
3. The recommendation is for capital cost apportionment regardless of ownership model selected.

EQV Wealth Capacity Model – recommended by the Ownership subcommittee

The data used in this model is taken from the Massachusetts Department of Revenue (DOR) website.

Town	2019 Pop.	2018 Property EQV	2019 Income EQV	Prop + Income EQVs	Town %	Capital Contribution
Ashfield	1723	248,466,800	241,759,400	490,225,200	34.46	344,614
Buckland	1864	216,985,500	222,381,700	439,367,200	30.89	308,862
Shelburne	1848	249,718,300	243,225,400	492,943,700	34.65	346,525
Total	5435	715,170,600	707,365,500	1,422,536,100	100.00	\$1,000,000

NOTE: The Ownership Subcommittee considers this model one that could be used when other towns seek to join the Senior Center Consortium. It could be the base for a capital buy-in which would be part of the financial negotiation to join. Scenarios with additional town membership were reviewed.

Equal Apportionment Model - 1/3, 1/3, 1/3

Apportionment equally shared among the 3 member towns, previously used as the housing cost in our lease agreement.

Ashfield	33.3%	\$ 333,333.33
Buckland	33.3%	\$ 333,333.33
Shelburne	<u>33.3%</u>	<u>\$ 333,333.33</u>
Total	100%	\$ 999,999.99

5-year Average Usage Model - The use of the 5-year average usage formula is currently used to apportion operating expenses which directly reflects programs, activities, and services used by seniors.

Ashfield	18.1%	\$ 181,000
Buckland	31.8%	\$ 318,000
Shelburne	50.1%	\$ 501,000
Total	100.0%	\$ 1,000,000

Ownership Models - Ownership Options

SENIOR CENTER OWNERSHIP OPTIONS

9/11/19

	Multi-town ownership	501(c)3	501(c)2	Single town ownership
Authorizing authority	Joint agreement; Possible special legislation; Needs approval of town meeting	Statute	Statute	Individual town; Contract with other towns; Needs approval of town meeting
Governance	Shared responsibility; Elected or appointed representatives	Independent board	Independent board	Determined by contract with other towns
Operating expenses	Shared – formula determined by joint agreement	Apportioned according to contract with towns		Determined by contract with other towns
Capital expenses	Shared – formula determined by joint agreement	Determined by contract with towns		Determined by contract with other towns

Ownership Models – Pros & Cons

	Multi-town ownership	501(c)3	501(c)2	Single town ownership
Pros	Less complicated; Could attract incentive funds for regionalizing services; Each town would have equal say in decisions	Less perceived liability for individual towns	Less perceived liability for individual towns	Less complicated
Cons	Subject to procurement laws	Requires substantial financial resources (see attached Senior Center Foundation position statement); No known other 501(c)3 that is interested in or capable	Can only hold title to property, collect income, and turn it over to another private entity; contributions from towns are severely limited as they cannot give to private organizations unless authorized by statute	Subject to procurement laws; One town could be seen to have more influence than others

Reasons Why the Foundation Should Not Own the Senior Center

The Senior Center FOUNDATION

Ashfield • Buckland • Shelburne

Reasons why the Foundation shouldn't own the Senior Center

9/11/19

June 27, 2019

To the Senior Center Expansion Committee,

With research being done on various ownership models for a new senior center, the Senior Center Foundation has serious reasons why the Foundation shouldn't own the Senior Center. Reasons already cited, such as legal complications (which could be managed with hard enough efforts) or a board not having the gifts needed for such an effort (which could be fixed, over some years, with a larger board) are significant, but are not the main reasons why the Senior Center Foundation should not own a new building or renovated space for a larger Senior Center. Here are other reasons:

- 1. The Foundation does not have the necessary financial base for such ownership.** Research shows that foundations who own significant property are multi-million dollar operations, with paid employees, and a network to handle such matters as insurance, management, maintenance of buildings, and the ability to pay or access loans as needed for unexpected expenses such as vandalism, fire, law suits, etc.
- 2. It is unlikely that the Foundation will ever have a sufficient or dependable enough cash flow to cover the expenses of ownership.** Despite the uncertainties of income for the towns, they are far better situated in terms of financial stability, experience of managing buildings, and access to funding.
- 3. It is critical for the sake of attracting grants and other funding, especially from the state, that the towns own the building to establish their commitment to the Center's importance and long-term existence.** The provision of programs and services for the senior residents of the towns is the responsibility of the towns. To insist that ownership reside with a private foundation is the avoidance of a basic tenant of communal obligation.
- 4. Our consultants and fund raisers have concluded that we will need at least two years to prepare sufficiently for a capital campaign that can raise the amount of money needed.** After two years, and a three-year campaign to help fund the building/renovation the Foundation might then begin to climb to a more secure financial position, but that will be years beyond when we need a new Senior Center to be fully established with ownership and adequate funding for operations.

Respectfully,

Margaret Payne, President, Renee Rastorfer, Vice-President, Marion Taylor, Secretary, Lowell LaPorte, Treasurer

Michael McCusker, Dena Briggs, Sylvia Orcutt, members

Cathleen Buntin, Sr. Center Director, and Donna Liebl, Sr. Center Board of Directors, ex-officio members

SITE DESIGN & SITE COMPARISON PROGRAMMING

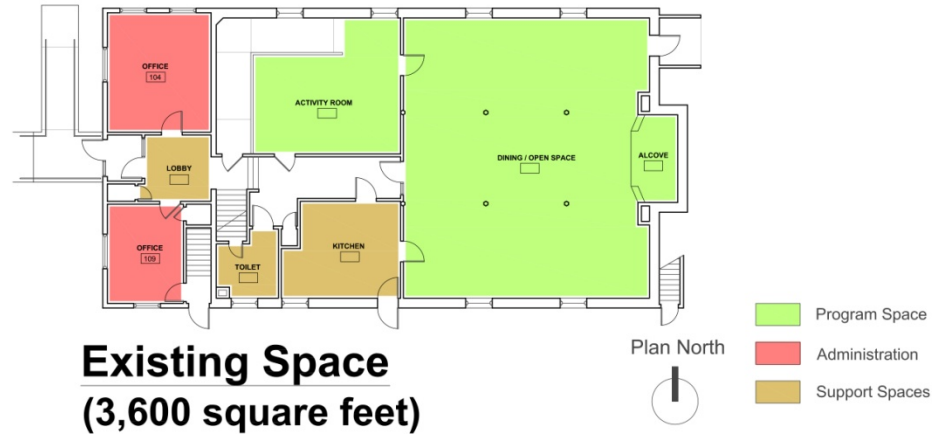
Program Analysis

CURRENT SHELburne SENIOR CENTER			
PROGRAM SPACE	qty	nsf	total nsf
Dining / Open Space	1	1,400	1,400
Activity Room	1	350	350
Total Program Space			1,750
ADMINISTRATION			
Director Office	1	160	160
General Office	1	250	250
Total Admin			410
SUPPORT SPACES			
Lobby	1	90	90
Storage 1 (Basement)	1	50	50
Storage 2 (Basement)	1	120	120
Kitchen	1	220	220
Toilets	1	75	75
Total Support			555
TOTAL NSF			2,715
TOTAL GSF			3,620

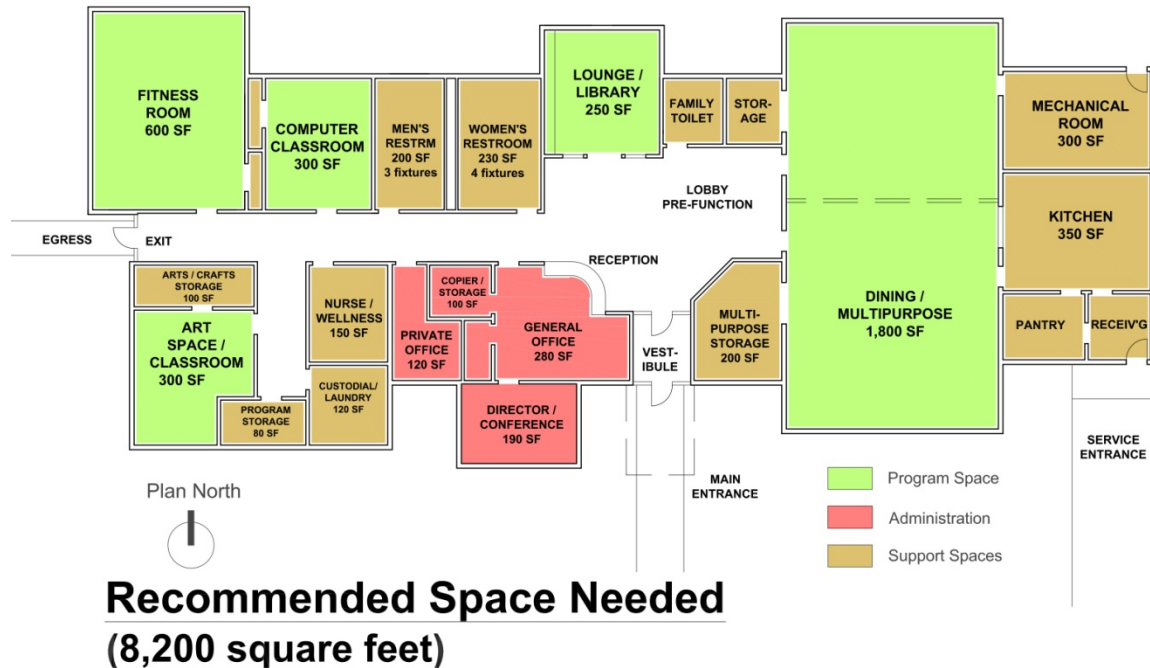
NEW SENIOR CENTER - SCHEMATIC PLANNING			
PROGRAM SPACE	qty	nsf	total nsf
Dining / Multipurpose	1	1,800	1,800
Arts / Crafts Classroom	1	300	300
Fitness Room	1	600	600
Computer Room	1	300	300
Lounge / Library	1	250	250
Wellness / Nurse	1	150	150
Total Program Space			3,400
ADMINISTRATION			
Director	1	180	180
General Office	1	200	200
Private Office	1	120	120
Copier / Storage	1	100	100
Reception	1	150	150
Total Admin			750
SUPPORT			
Vestibule	1	80	80
Lobby	1	200	200
General Storage	1	200	200
Program Storage	2	100	200
Kitchen	1	350	350
Pantry / Receiving	1	150	150
Laundry	1	60	60
Custodial	1	75	75
Adult Group Toilets	2	200	400
Family Toilet	1	70	70
Mechanical	1	300	300
Total Support			2,085
TOTAL NSF			6,235
TOTAL GSF			8,313

Program Analysis – Size Comparison

Current Existing Space



Generic Possible Future Space



PROCESS

PROCESS: OPTIONS FOR FUTURE LOCATION OF THE SENIOR CENTER

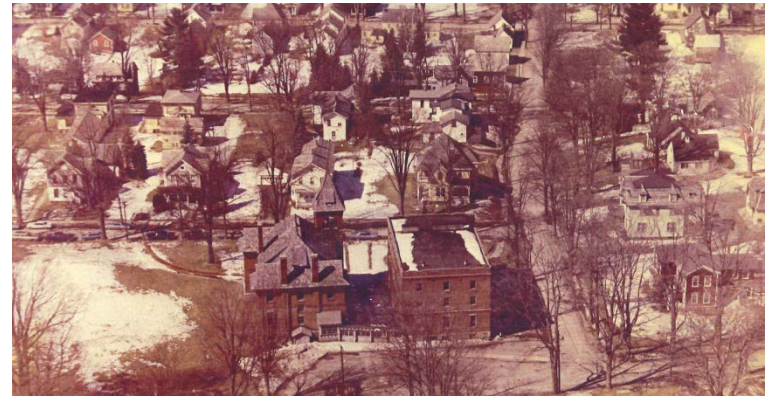
FOUR POSSIBLE OPTIONS

1. Renovation of former Mole Hollow Candle
2. New Construction at location near Arms Academy
3. Renovation and Addition at existing Buckland Police Station
4. Renovation and Small Addition at Masonic Building

Renovate Mole Hollow Candle on Deerfield Avenue



New Construction Adjacent to Arms Academy



Renovate and Expand Buckland Police Station on Conway Street



Renovated and Expand at Masonic Building



FOUR SITE COMPARISON CHART

SENIOR CENTER IN SHELBURNE FALLS

Comparison of Various Sites Considered for a New / Expanded Senior Center

Task List

Building Name	Location	Discussions with Owner / Neighbors/ Stakeholders	Preliminary Building Layout Planning	Preliminary Site / Parking Planning	Preliminary Cost Estimating based upon square footage Costs	Preliminary Review with Public and Ranking based upon feedback	Availability / Discussions with Current Owner	Building Inspection Report
Next to Arms Academy	Church and Maple Street	Ongoing	In progress	In progress	Completed. To be updated	Completed Spring 2019	Owned by Town of Shelburne. Further talks with Shelburne Selectboard as necessary	N/A
Mole Hollow	Deerfield Avenue	In depth discussions have taken place with Building Owner. Public forum received feedback from Commercial neighbors and concerns about parking / traffic.	Completed	Completed	Completed	Completed Spring 2019	Private Owner. Property currently for sale.	Completed 2018
Masonic Building	7 Main Street	In Progress	In Progress	N/A - Very little site parking available beyond what is currently on site	Base cost estimating was done. Further cost estimating based upon potential expanded renovations to be done.	Initial Assessment Completed 2015 based upon partial use. Revised review based upon possible full building use to be considered.	Senior Center in early discussions with Mountain Lodge Masons.	Completed 2019
Buckland Police Dept.	Conway Street	Very preliminary discussions with Buckland Selectboard have taken place. Further discussion warranted.	Completed	Schematic Site Review has been reviewed. Further site review as necessary	Completed	Completed Spring 2019	Buckland Selectboard has publicly discussed as a possible location for a Senior Center. Further discussion as necessary.	Not undertaken yet.

COST COMPARISON

Approximate Cost Comparison

(assume 5-8% construction cost escalation per year)	Approx. \$ / sq ft	Sq ft	Sub-Total	Other Costs	Approx. Total Cost
<u>Possible Site – Mole Hollow</u>					
Mole Hollow Reno/ Add	\$ 270	10,000	\$ 2,700,000	\$ 800,000	\$ 3,500,000
Purchase & Site Related				\$ 600,000	<u>\$ 600,000</u>
					\$ 4,100,000
<u>Possible Site – Next to Arms Academy</u>					
New Construction*	\$ 400*	8,200	\$ 3,280,000	\$ 980,000	\$ 4,260,000
Purchase & Site Related				\$ 500,000	<u>\$ 500,000</u>
(higher costs per SF due to height and brick detailing)					\$ 4,760,000
<u>Possible Site – Buckland Police Station</u>					
Renovation	\$ 230	5,600	\$ 1,290,000	\$ 380,000	\$ 1,670,000
New Construction	\$ 350	2,600	\$ 910,000	\$ 270,000	\$ 1,180,000
Purchase & Site Related				\$ 500,000	<u>\$ 500,000</u>
					\$ 3,350,000
<u>Possible Site – Masonic Building</u>					
Renovation & Addition	\$ 230	9,300	\$ 2,140,000	\$ 640,000	\$ 2,780,000
Purchase & Site Related				\$ 700,000	<u>\$ 700,000</u>
					\$ 3,480,000

NEXT STEPS

THANK YOU!