

REPORT & RECOMMENDATIONS

For

**Young at Heart Senior Citizens Center
Rock Springs, Wyoming**

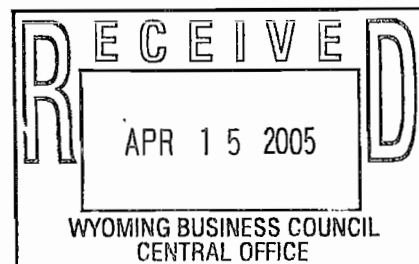
March 8, 2005

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I. BACKGROUND

In 1999, the Young at Heart Senior Citizen Center's (the Center) leaders initiated a plan to construct a new, 34,000 square-foot facility that would provide sufficient space to deliver on-site programs and services, provide adequate offices for the staff necessary to sustain increased services, and to allow better coordination and delivery of at-home services. After an extensive site search, the Center's building committee selected a BLM site on Reagan Avenue and Sweetwater (near the recreation center).

It's Mission . . . To provide a wide range of activities and social programs for seniors living in Sweetwater County. Special emphasis is placed on education in nutrition, employment or volunteerism, health promotion, income maintenance, counseling services, supportive services, case management and serving as a library of information and knowledge on aging services in our community and state. The Center also provides services including in-home health care, meal delivery, and help with household duties along with many other programs.

The Need . . . Since its founding, the Center has grown to deliver significant services to seniors, both in their own homes and in the center itself. The core issue confronting the Center's board and professional staff today is how to sustain services so that seniors are able to age in place, in grace, and with dignity to the highest degree possible in their own homes.

The current facility was built in 1980 and served an average of 500 seniors in that year. Twenty-five years later in 2005 the same facility serves approximately 2,500 seniors and disabled per year — a five-fold increase. In 1980, everything was built for what was needed at that time but not for the growth that has transpired and will continue to occur. Many new programs and services have been added as needs have been identified. Furthermore, there are waiting lists for most of the community-based programs.

In December 2004, National Community Development Services, Inc., (NCDS) of Atlanta, Georgia, was retained to conduct a feasibility analysis to determine the level of financial support that the Center could anticipate from the local community for underwriting the cost of construction of a new facility. The assignment was completed in mid-February 2005 and the findings are presented in this report.

II. FEASIBILITY ANALYSIS METHODOLOGY

Interview Assessment

Working closely with Center board members and executive management, a list of approximately 150 prospective interviewees was developed. Special attention was given to ensure an appropriate representation of public and private leaders located throughout the immediate Rock Springs area.

A Pre-Interview Letter announcing the Center's intent to conduct interviews then was drafted and signed by Center Board Chairman Ted Higgins, Board Members Fred Parady and Tom Kershnik, State Representative Marty Martin, and City of Rock Springs Mayor Timothy Kaumo. A copy of the Pre-Interview letter is included in the addendum to this report as Exhibit A. The Pre-Interview letter was mailed to all prospective interviewees along with a copy of a *Prospectus* (Exhibit B). The Prospectus detailed the proposed project and its \$9.0 million budget.

Between January 17, 2005, and February 11, 2005, NCDS representatives conducted sixty-two (62) interviews. A complete List of Interviewees also is included in the addendum to this report as Exhibit C.

All interviews were conducted in person except the two conducted via telephone. The interview format was conversational and guided by a customized Questionnaire (Exhibit D) to ensure consistency and relevance. Each interview was prefaced with a statement of confidentiality and it is the opinion of counsel that interviewees spoke openly and candidly. The typical interview lasted an average of 20 to 45 minutes.

While NCDS representatives did not ask interviewees for a specific financial pledge commitment, interviewees were shown an Investment Range Table (Exhibit E) profiling

the number and levels of financial investments necessary to attain a goal of \$9.0 million. Each interviewee was asked to suggest a range of support that they might consider, should a campaign be recommended and launched.

Responses in this report are shown in the aggregate, and un-attributed quotations are included to more effectively relate the tone and flavor of the replies. Recommendations and conclusions contained in this report are the result of careful analysis of collected data by senior management of NCDS.

The Interviewees

In total, sixty-two (62) formal interviews were conducted.

“Business” made up the largest category of interviewees representing sixty-three percent (63%) of the sample. Prospect types were categorized as “Business,” “Individuals,” or “Government.”

The chart below illustrates the number of interviewees in each category:

<u>Prospect Type</u>	<u># of Interviewees</u>	<u>Percentage</u>
Business	39	63%
Individuals	16	26%
Government	7	11%

III. HIGHLIGHTS

1. A significant majority of interviewees (79%) regard themselves as either "very" or "somewhat" familiar with the Center. Interviewees' overall comments on the subject of familiarity, however, suggest that Center's specific mission generally is not well understood by the Rock Springs community. Nearly all interviewees who consider themselves familiar with the Center (98%) hold either a "favorable" or "somewhat favorable" impression of the Center.
2. The Center's professional staff is regarded as an effective group of individuals who are very passionate and dedicated. Four-fifths of interviewees (80%) were unfamiliar with the Center's Board of Directors thus could not offer an accurate assessment of the group.
3. Almost all respondents felt that the proposed project should be funded through some form of government assistance rather than private sector donations.

Historically, the Center has received the majority of its funding through public funds provided by the City of Rock Springs, Sweetwater County, federal grants and local fundraising efforts. Eighty-six percent (86%) of interviewees did not believe the private sector would support a capital campaign at the \$9.0 million dollar level. The same eighty-six percent (86%) would, however, support a one-half cent sales tax in Sweetwater County if it were to come up for a vote and virtually everyone believed this method of funding would be the Center's best chance for raising the funds necessary for the construction of a new facility.

4. While the overall assessment of the plan is viewed as "necessary/beneficial" by fifty-seven percent (57%) of interviewees, a number of respondents felt that the Center should not move to the proposed location and remain in the downtown

area. Renovating one of the recently closed public school buildings in the downtown area was a frequent recommendation.

5. Indications of private sector support were almost non-existent with only nineteen percent (19%) of interviewees giving a financial indication of any kind. Too few appear to have a passion for this fundraising effort. No strong leadership-level financial indication that is required for significant fundraising success was forthcoming.
6. Efforts to secure individuals willing to serve or those who would consider serving on a capital campaign leadership team were largely unsuccessful. Only twenty percent (20%) of those interviewed agreed to serve either as a "door-opener" or in a "leadership" capacity or said they might consider helping in some capacity if time permitted.
7. Despite the general agreement by those who are familiar with the Center that the existing facility is inadequate and something needs be done to resolve the capacity and maintenance issues, the Center currently lacks the "asking rights" needed to secure substantial financial support for the proposed facility from local, private sources. A major capital campaign to fund a new facility is not feasible at this time. There is simply not enough awareness of the Center's current predicament, nor is there a history of involvement/interest by enough major donor prospects to expect success at securing the number and sizes of gifts needed to win a campaign.

IV. KEY ELEMENTS REVEALED BY THE INTERVIEWS

Familiarity with the Center

Familiarity with the YAHSCC was generally the first topic discussed with interviewees. Three out of four (79%) considered themselves either "very familiar" or "somewhat familiar" and only (21%) were unfamiliar with the Center. Only about one-third of those interviewed (39%) said that they or a family member had actually visited the Center or they had used one of the in-home services provided by the Center. Those who considered themselves to be "somewhat familiar" knew some details of the services provided by the Center or had read something about the Center in the newspaper but had actually never used or visited the Center personally.

While we acknowledge that most of this awareness would logically reside with people who have actually benefited from Center's services, this lack of community awareness suggests that any fundraising effort would first require activities designed to educate the community about the Center. NCDS' professional interpretation is that the Center has, to its credit, focused primarily on achieving its mission and serving seniors in need. Because of its modest budget and the operational funding provided by the public sector, there has not been an urgent need to promote itself for fundraising purposes. Organizational focus and priorities will need to change if the Center is to launch a capital campaign in the near future.

Representative Comments:

"My parents use the Meals-on-Wheels a good bit."

"I see something about them in the paper once in awhile."

"I used to go down there but I don't go anymore."

"I am not old enough to use it yet."

General Impressions of the Center

Interviewees were asked to give their general impression of the Young at Heart organization based on their experiences. Seventy-two percent (72%) gave a “favorable” rating and twenty-six percent (26%) gave a “somewhat favorable” rating. A very small minority said they were dissatisfied with their experiences with the Center.

Representative Comments:

“They serve a vital need in our community.”

“It’s a very worthwhile program. They keep that age group busy.”

“It’s a good program and we are lucky to have something like that here.”

Rating the Effectiveness of Center Staff/ & Board of Directors

The staff received high marks for effectiveness from forty-six percent (46%) of interviewees. Fifty-four percent (54%) could not give an opinion as they had no contact with anyone or just couldn’t remember them. Favorable comments especially were directed at Jeanine Cox for her work and accomplishments. The members of the Board of Directors were unknown by eighty percent (80%) of those interviewed and received “good” or “excellent” marks from the remaining twenty percent (20%).

Representative Comments:

“Jeanine has done an excellent job.”

“Great people. I wish we could pay them better so we didn’t lose so many of them. ”

“Don’t really know them, who is on their board?”

“They have a weak board when it comes to fundraising. They don't have the financial strength it takes for this type of campaign.”

How Would You Characterize the Community's Regard Towards This Project?

While a handful of interviewees had actually reviewed and thought about the information presented in the *Prospectus*, most required a brief overview of the premise behind a new facility and a description of the new location. Interviewees were then asked to comment on how high a priority they believed the business community would assign this project; whether or not the proposed project was appropriate in terms of size, facilities, cost, etc.; and where this project would "fit" as a community effort.

Interviewees were asked to characterize how the Rock Springs business community would regard this project by answering "highly favorable," "somewhat favorable," or "not in favor." Slightly over half (52%) thought that the business community would "not be in favor" of supporting this project. Thirty-five percent (35%) thought the community would be "somewhat in favor" and thirteen percent (13%) said "highly favorable."

Probing deeper on this subject, interviewees were asked why they answered as they did. Those who believed the community would not be in favor thought that many in the community were likely unaware of the Center's activities, services and needs. Others said, somewhat reluctantly, that the business community would be more supportive if the project had some kind of return on their investment or the subject matter was something that too many would rather not think about.

Representative Comments:

"I would say not in favor, but I hope I am wrong."

"I think the core business community should support them."

"I don't think most know what they do there."

Rating the Services Provided by the Senior Center

The statistical data below shows how interviewees ranked on a scale of 1 to 5 (with 5 being the highest) each of the following:

RANKING	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>
Allowing seniors to age at home vs. outside facilities	0%	0%	0%	6%	94%
Deliver programs which allow seniors to maintain physical, mental and emotional well-being	0%	0%	0%	6%	94%
Effective and cost-efficient counseling & support services	0%	5%	13%	38%	44%
Education on nutrition, employment & income maintenance	0%	0%	12%	38%	50%
Social and volunteer opportunities	0%	0%	6%	19%	75%
The Center as a civic asset	0%	0%	6%	31%	63%

Overall Assessment on the Proposed Construction Plans

The general content of the *Prospectus* were endorsed as "necessary and beneficial" by fifty-seven percent (57%) of those interviewed. A significant percentage (41%) felt the plan was "not on target" or "unnecessary." Several interviewees stated that they were concerned about the new location as it was too far away and that many seniors would not want to drive the busy streets and intersections to get to the new building. Some interviewees were concerned about having seniors driving through nearby residential neighborhoods especially during times when schoolchildren would be outside playing or walking to or from school.

A significant portion of the interviewees stated that while they understood the need for a larger facility and that the BLM land was likely a good location, they would rather see the Center remain downtown as it is one of the few anchors the downtown area still has and a majority of those seniors who use the facility live near the downtown area. Most of the interviewees would prefer to see the Center's leadership continue to search for an existing building that is more centrally located and one that would need only minor renovations rather than construct the proposed facility in its planned location. Lincoln Elementary School was mentioned most often as a potential site.

Representative Comments:

"I would hate to see it move so far away from our downtown."

"It really seems unnecessary. The building will be empty most of the day just like the old one is now."

"I have heard that some residents near the new site don't want it there because they don't want the seniors driving through their residential neighborhood. There are a lot of kids on the street going to school and it could be a dangerous situation to have the seniors driving through there all the time."

Prioritization of Proposed Plan

Interviewees were asked to prioritize the degree of importance of the proposed plan to them personally compared to their other philanthropic interests using the ratings of "high priority," "medium priority," "low priority," or "no interest."

Responses given were as follows:

High Priority	Medium Priority	Low Priority	No Interest
16%	31%	12%	41%

The responses indicate that a large percentage of those interviewed consider the proposed program not to be a high priority to them at this time. An important factor should be noted here that interviewees who have never used the Center's services gave a rating no higher than a "low priority." Another indication that the YAHSCC leadership needs to address the general lack of awareness of the Center's needs before any significant fund raising can begin. This will be addressed further in the Recommendations section of this report.

Representative Comments:

"We have a lot of employees in Rock Springs and retirees in the area. Sweetwater County is very important to us."

"We mainly support youth sports and education so this would be more of a Medium to Low Priority for us."

"Our headquarters won't let us do very much in Rock Springs. Even if they did, I don't think this is something that they would take an interest in. At least I have never heard of them doing anything like this before."

Recommendations That Differ From the Prospectus

When interviewees were asked if they had any recommendations that differed from the *Prospectus*, several ideas were offered in no particular order of importance. These suggestions may not be feasible but the following reflects some of the recommendations given:

"The Center needs to get with Bob Ramsey on the School Board. He may be able to help them get into one of the schools that recently closed."

"They shouldn't partner with Star Transportation. They are a money-losing operation and they will hurt your chances to raise money."

"Build in smaller phases and then add on in the future if they need to."

"They should buy the buildings next door and tear them down to make room for more parking."

"Why can't they get an Abandoned Mine Land grant to fix their flooding problems?"

Funding Potential

An important prerequisite for success in any capital campaign is the setting of a goal that is considered challenging but realistic by those who will be asked to provide campaign leadership and set the pace for investing. Experience has shown that while top investment prospects and key campaign leaders will support a goal that is ambitious but attainable, they will back away from a goal, which appears to be out of reach.

Persons interviewed were asked whether they felt that the YAHSCC could ask for and receive private sector investments totaling \$9 million, to be paid over a three-year period, in support of construction of a new 34,000 sq. ft. facility.

Interviewees were shown an Investment Range Table listing the number and range of investment pledges typically needed to reach a \$9 million goal. Then, they were asked whether the Rock Springs area businesses would invest the dollars needed to fund the construction over the next three years. As a group, a very high percentage (86%) responded "no," and fourteen percent (14%) indicated "yes."

One recurring theme was heard throughout the interview process (thanks to several media reports on the current legislative session) was the State of Wyoming has a \$1 Billion budget surplus. These news reports only reinforced the following statement made by the majority of interviewees: *"This project is something the government should pay for and not the private business folks. The state has plenty of money."*

Representative Comments:

"Industry does not want to bear the brunt of these costs."

"The Center should be funded like a school building. It's more of a community responsibility rather than something the private sector should support."

"The state is loaded right now so state funded programs like this should push harder for state funding rather than from private sources. It's going to be tough to raise money for something that should be supported by the state."

Would You Be Supportive of a Sales Tax Increase to Fund This Construction Plan?

An overwhelming eighty-six percent (86%) indicated they would support a countywide sales tax increase and would prefer this over a capital campaign targeting the local business community in order to raise the \$9 million needed for construction of the new facility. Sweetwater County had recently used this method of using a half-cent sales tax to raise \$12+ million in less than two years to build a new county jail.

Although this option was the majority's choice for funding, there will be some competition from other organizations (the Events Center was cited most often) for these tax dollars. Since the county jail was successfully funded in its entirety and in less time than was projected, several organizations are now making plans to go before the County to get on the ballot.

NCDS was informed, before the Center can get its proposed plan to the voters of Sweetwater County, the community leaders from four out of the six communities in the county must approve the measure before it can be placed on the ballot for a public vote. The unanimous opinion of those knowledgeable and closest to this process believe that the proposed facility will be seen as only benefiting the seniors of Rock Springs and that no other community will be supportive of the sales tax increase unless it will also benefit themselves in some way.

Several interviewees stated that the best chance YAHSCC had for success was to get the YAHSCC leadership to work together with the leaders of other organizations in other communities who are also pursuing a sales tax increase to create a prioritized list of projects with specific amounts needed that have a specific length of time clearly identified for each project. This way the voters from every community in Sweetwater County will reap the benefits from the added sales tax revenue. However, this scenario is very precarious as voters have turned down several projects in the past that were “bundled” together. Stiff opposition from businesses selling big-ticket items should also be expected as their sales will be adversely affected by a higher sales tax as some customers will withhold purchases until the tax increase is lifted.

Because of the success of the county jail and the impending demand for further sales tax initiatives, there are discussions taking place within the Attorney General’s office to create a set of criteria determining which organizations are eligible for tax support and which are not. Conversations with the County Commissioners suggest that private organizations will not be eligible but a public organization would be. Calls to the County to clarify the exact ruling (if one has been determined) were not returned as of the time this report was written. It is likely that the City of Rock Springs (a public organization and future owner of the new facility) would have to do the “heavy lifting” in order to get this on a future ballot for a public vote.

Representative Comments:

“I think this is likely what they will have to do. It will hurt some businesses in town that sell big-ticket items. They will fight it.”

“They should go with the sales tax option and bundle it with other projects in Sweetwater County. It's the only chance they have of getting it passed.”

“Green River will shoot it down unless they get something out of it too.”

“The seniors have a strong political position in Rock Springs and they have rallied against proposals in the past. This may come back to haunt them if they try to get votes for a sales tax.”

Availability of Campaign Leadership

Of those persons who were asked if they would consider helping the Center during its fundraising campaign, only 20% said that they would accept a "door opener" position or would take on a leadership role in a "limited" capacity. No interviewee during this assessment stated that they would be willing to Chair a fundraising campaign. Many simply do not have the requisite profile and influence. Others have prior obligations to other organizations and have no available time.

Competing Campaigns

Interviewees were asked whether they knew of other capital campaigns in the area which might compete with a capital campaign for either investments or leaders. Respondents mentioned several campaigns in the Rock Springs area that are wrapping up, in the planning stages, or in some phase of solicitation. The campaigns most likely to compete for dollars and leaders with a campaign for the Center are listed below. It is assumed that there may be additional campaigns that were not mentioned (churches, Boy Scouts, schools, etc.) but these listed were most often referenced. Dollar amounts listed are not confirmed by NCDS.

Western Wyoming Community College	\$4 -5 million
Sweetwater County Events Center	\$5 million
SWEDA	\$2.5 million
Memorial Hospital of Sweetwater County	\$30 million

Miscellaneous Quotes

Interviewees were asked whether they had any other comments or factors, which, in their judgment, might influence the outcome of a capital campaign on behalf of the Senior

Center. The comments of respondents reflect no common themes beyond the reiteration of some of the opinions reported in earlier sections of this report. Hence, while not representative in the sense that they suggest the opinions of a number of interviewees, the comments in the next section are included for the sake of completeness.

Representative Comments:

"They should wait at least a year before they try to raise any money from the businesses in Rock Springs because the college is starting up their campaign. They should use that time to market their needs to the community. Join the Chamber and participate in networking events. Elevate their visibility before going before the public."

"I haven't seen a lot of philanthropic giving by the larger companies in town . . . for any cause."

"There are too many requests from other organizations and we can't support everyone."

"Now is the time to do something. We will be booming for another 5-7 years. If they wait too long, they will miss their chance."

"I would like to see more detailed demographic statistics on our aging population. I think a lot of people move away from here when they retire so I question where some of these numbers are coming from."

"How much is Star Transportation putting into this? I don't think they should be getting a free ride."

"Who do they have on their board who can really sell this to the community?"

"Our local hospital is a mess right now and I think more people in the community have concerns about our healthcare system than they do about our seniors."

V. NCDS RECOMMENDATIONS

A campaign goal of \$9.0 million pledged from private sources within the Rock Springs area is not feasible or realistic at this time. Based on information available at this time, the necessary interest and/or willingness of possible donors to make the requisite lead financial commitments is lacking. During the next six to eight months, the Center should take appropriate actions to better position itself to get on an upcoming ballot for the sales tax vote if at all possible.

Also, NCDS recommends that the Center focus on the following steps in order to better position itself for possible private sector funding:

1. Develop a "Friends of the Center" program to steer community awareness. The leadership of this organization should work overtime to become the proactive voice for the Center. It is imperative that the "Friends of the Center" communicate the many positive programs that the Center is contributing to not only Rock Springs but to Sweetwater County, as well as to inform the public of the increasing needs of the Center. A sustained educational campaign that will promote greater community awareness of the Center, including its mission, the seniors it serves, and its current under-capacity before the next tax referendum could be most effective to ensure the passing of the additional sales tax funding and to better position the Center for private sector funding.
2. Strengthen the Center's Board of Directors. New Board members should be considered, in large part, on financial capacity (as individuals or as representatives of an organization with financial capacity); their ability to open prospective donors' doors and to attract and influence others; and their enthusiasm for the Center.

3. Independent yet consistent with efforts to strengthen its board, the Center should effectively cultivate a group of “advisors” that can provide the kind of leadership necessary if and when a campaign is launched. The goal is to have several influential community leaders (particularly in the private sector) interested in the organization and become “the champions” for the Center, convinced of the needs and vision of the new facility. In other words, the Center should focus on “friend-raising” before “fundraising.”
4. Organize a taskforce under the “Friends of the Center” that will develop a plan for working with other organizations within Sweetwater County that are considering going to the County for sales tax funding. A “bundle” of projects benefiting all citizens of Sweetwater County may have the best chance for voter approval.
5. Continue to utilize a site selection committee to locate alternative sites in the event the sales tax option is unsuccessful. Strengthen this committee to include members of the school district, city council, county commissioners or other interested parties that have the desire and ability to locate a more suitable location for a larger senior center.

VI. CONCLUSION

While the feasibility study may not have generated the funding recommendations that were originally hoped for, its findings should offer the Young at Heart Senior Citizens Center some encouragement.

The mission of the Center is generally recognized as being necessary to the quality of life for the seniors of Rock Springs. Unfortunately, this aspect alone does not guarantee a winning campaign. There are several factors that would adversely impact the likely success of a funding campaign at the present time, and some of those are beyond the control of the Center. Notwithstanding these factors, there are also issues the Center can control and strategies it can pursue to effectively prepare the organization to conduct a successful public sector campaign in the future.

NCDS' experience with hundreds of other campaigns and organizations, our observations during this assignment, and the candid feedback from those interviewed all contributed to the recommendations offered in this report. These findings and recommendations can be summarized as follows:

While citizens of Rock Springs recognize the Center and its mission as vital to its elderly citizens, collectively, they are not yet ready to make a major financial commitment. Education and public awareness are significant to putting people in a "check-writing mode," and the cultivation of the right people is critical to getting the size and number of checks needed to underwrite the additional needs envisioned for the new Center and programs.

We are grateful for the assistance and friendliness provided by Jeanine Cox and her staff during this study. We especially thank Joyce Corcoran for her tireless efforts to schedule and coordinate the interviews. We also appreciate the chance to serve this great community and look forward to being of assistance to Rock Springs in the future.

VII. EXHIBITS

- A. Pre-Interview Letter
- B. Prospectus
- C. List of Interviewees
- D. Questionnaire
- E. Investment Range Table

January 7, 2005

Bruce Macy
Macy's Truck Repair
925 Stagecoach Dr
Rock Springs WY 82901-4056

Dear Bruce Macy,

The Young at Heart Senior Center is committed to providing quality, effective and efficient programs to our community. From home delivered meals and transportation to medical appointments to recreation and fitness programs, the Center strives to provide services which assist seniors and their families in leading independent and useful lives.

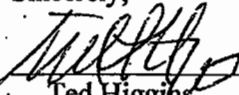
The center has experienced a steady increase in demand for services as the population of Sweetwater County continues to grow and age. In 1987 the Center served 700 seniors and is now serving over 2,400. It is projected that the center will service 3,150 seniors by 2020. To effectively deliver its current programs and accommodate projected growth, the Center has taken a hard look at the current facility. Pressing maintenance, water table and capacity issues have forced the Center to draft plans for a new 34,000 square foot facility at a new location.

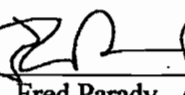
Before the board moves forward, we need to know what you and others think of this plan and to what extent this initiative can be supported. To help us, we have retained National Community Development Services (NCDS) of Atlanta, Georgia, to conduct a feasibility analysis. Part of their work involves a series of personal, confidential interviews with key opinion leaders in our area.

Shortly, Jeanine Cox, Executive Director of the Young at Heart Senior Center, will contact you to set up a convenient time for a 30-45 minute personal and confidential interview at your office or home with an NCDS representative. *They will be seeking your opinions, not money.* We would be most grateful for your assistance and hope you will make yourself available to share your candid views and ideas. This process will be critical in our decision making process moving forward.

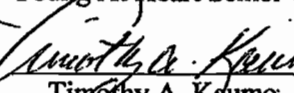
Enclosed for your advance review is a draft of the proposed building plan and architectural rendering. We appreciate you taking the time to visit with NCDS and helping us support our senior community for many years to come.

Sincerely,


Ted Higgins
Chairman of the Board
Young At Heart Senior Center


Fred Parady
Board Member
Treasurer


Marty Martin
Board Member


Timothy A. Kaumo
Mayor of Rock Springs


Tom Kershnik
Board Member

A Prospectus for the

Young at Heart Senior Citizens Center

**538 Pilot Butte Ave
Rock Springs WY 82901
307-352-6737
Fax - 307-352-6735**

Building for the Future
2005-2007

January 2005

I. Executive Summary

The Young At Heart Senior Center (the Senior Center) plays a central role in the lives of Rock Springs senior and disabled citizens. Since its founding, the Senior Center has grown to deliver significant services to seniors, both in their own homes and in the center itself. The core issue confronting the Senior Centers' board and professional staff today is how to sustain services so that seniors are able to age in place, in grace, and with dignity to the highest degree possible in their own homes. Without question, a new and larger building is vital to meeting our mission.

II. History

The facility presently occupied on 538 Pilot Butte Avenue was built in 1980 and served an average of 500 seniors in that year. The Senior Center and the programs offered promote the goals of fostering self-sufficiency; preventing abuse, neglect or exploitation; developing services and programs to enable older individuals to attain and maintain physical, mental and emotional well-being.

Twenty-five years later in 2005 we are in the same facility and serving approximately 2,500 seniors and disabled per year -- a five-fold increase. In 1980, everything was built for where we were at that time but not for the potential for growth that we are now facing. We have added many new programs and services as needs have been identified. Most days we have programs or activities in every available room. There are waiting lists for most of our community-based programs.

The Young at Heart Senior Center is a focal point of service for the elderly. In Sweetwater County, the Senior Center serves over the course of a fiscal year, 95% of the people over the age of 60 in some capacity. It is a vital link for the seniors throughout the community, providing a wide range of activities and educational and social programs. Special emphasis is placed on nutrition, employment or volunteerism, health promotion, income maintenance, counseling services, supportive services, case management and serving as a library of information and knowledge on aging services in our community and state.

The Senior Center has excellent programs and services for seniors who want to stay in their own homes and communities. The Senior Center provides services including in-home health care, meal delivery and help with household duties along with many other programs. Senior centers are the most cost effective way to deliver these services to seniors. The average monthly cost for the senior center to keep someone in their home is approximately \$200, as contrasted with nursing home care that can cost over \$3000 per month. The continuum of care that is necessary to support seniors begins with our center and its activities.

We have no official membership. When a person reaches the age of 60, they are eligible to participate in any program or service offered at the Senior Center. The by-laws state that the person's spouse, regardless of age, is also eligible.

The Senior Center has never charged a membership fee or given membership cards. We ask only that each person over the age of 60 help by participating in the "Appreciation Donation Club."

III. The Need

In 1996, the population of Wyoming was 481,400. Statistics show that by the year 2010, Wyoming's total population is projected to be approximately 543,400 which will be a nine percent increase. According to the United States Census Bureaus projections, the **elderly population will more than DOUBLE between now and the year 2050**. Each year the number of seniors the Young at Heart Senior Center will serve will increase in the already overcrowded facility we now have unless we see the realization of the goal of a new facility. In seven years time, a continuous nine percent annual increase will mean serving at least 2,725 individuals and the number will likely continue to rise each year.

The growth of the senior population in Wyoming is the fifth-fastest in the nation, and will increase substantially as baby boomers join the over-60 set in the coming years. A greater percentage of the population will need services to allow them to remain independent in their own homes for as long as possible and to enhance their quality of life.

In the past, 60% of the seniors served were served at the center with 40% served at home. **Today, those percentages are reversed.** As more seniors take advantage of the Center's resources, additional staff and programs will be required, further straining a facility that was designed to service only 700-1000 seniors.

We serve primarily two groups of seniors. The first are those who come to the center, and they are generally more active, with a higher income and more able to participate in a wider variety of activities. The second group includes those who need services in their homes.

We do over 700 services each day out of the Young at Heart Senior Center. Roughly 60% of these services are in home (i.e., out of center, if you will) and they are at a one-to-one staff ratio. Across all programs we have 47 staff, of which, only seven are full-time. The roughly 40 part-time staff average 23 hours per week. It should be noted that staff turnover is high, pay is low, and benefits are very limited, which are serious issues for the Board in the near future.

Facility cost is becoming a much more serious and burdensome issue. As the current facility continues to age, more frequent and costly repairs are needed in addition to stepped-up maintenance (furnace repairs, kitchen appliances, etc). Compounding problems with the current facility are water table issues causing frequent flooding and mold due to the building site is in a floodplain. Further, elevated levels of carbon dioxide require frequent monitoring. These issues are significant enough to have drawn serious scrutiny from the fire marshal and we have had safety experts monitoring the mold issue.

Finally, beyond its age, expense to maintain, and inadequate size, our building simply doesn't serve our mission. Our many volunteers who deliver meals on wheels must carry meals across a poorly designed landing and icy steps in the dead of winter to their individual cars. We lack information technology (the need for email by seniors to keep up with their grandkids and family is real and unmet), and our staff labors with outdated computers and support equipment. Our rooms themselves don't fit their uses, whether it is for health care screening, band practice, meetings, or just socializing.

IV. New Facility - \$6,000,000

In order to continue to fulfill the Senior Center's mission of serving seniors, the Senior Center established the goal to build a new facility in 1999. This new 34,000 square foot facility will be cost-effective for the long-term providing sufficient space to deliver on-site programs and services with adequate offices for the staff necessary to sustain increased services, and finally, to allow better coordination and delivery of at-home services. After an extensive site search, the building committee selected a BLM site on Reagan Ave and Sweetwater (near the recreation center).

To more seamlessly deliver one of the Senior Center's more utilized services and address the growing needs of the Sweetwater Transit Authority, both groups will co-locate at the new facility. Not only will this co-location provide increased program delivery benefits to the area and on-going operational savings but also eliminate the construction costs for two separate facilities.

Current funding for ongoing programs comes from three primary sources. Of the center's roughly \$750K annual budget, 40% is from state and federal sources, 48% comes from the city and county, and the remaining 12% comes from a variety of United Way, donations, waivers, fund raising and other sources.

The programs delivered at or out of the Young at Heart Senior Center can be broadly categorized as home support services, health care and nutrition, social services, and other activities that sustain seniors in their independence. A complete list of programs can be found in Appendix A. It is worth noting that over 230 volunteers donate over 32,000 hours annually to the senior center and the community, which is a strong measure of the support the center enjoys in the community.

The Board has made a data driven decision to pursue this new facility. Relevant statistics are summarized in the Table 1 – Relevant Statistics. The number of seniors served has over tripled in the time period shown.

Table 1 – Relevant Statistics.

Year	# Seniors	# Services	Budget	# Services/Day
1988	707	32,647		130
1995	1682	94,168	\$349,935	377
2000	2126	158,683	\$570,615	634
2002	2300	175,000	\$740,000	700

As can be seen, the explosive growth in senior services in less than a decade has been matched by efforts to control costs. Costs-per-service have held steady at roughly \$4, which is remarkable given the inflationary pressures in utility, food, and staff costs.

Further, by the year 2010, the Center is projected to serve a 20% increase in seniors and a 40% increase in services, and that increase continues to escalate beyond that time frame. This is not a case of building a new high school for the one ‘bulge’ class. Rather, it is a case of constructing a facility to meet needs that exceed those ever anticipated for the current building.

V. Foundation Support - \$3,000,000

The Board is cognizant of the need to sustain funding to support new or increased services, even as they are equally cognizant that our seniors need services. The Senior Center remains committed to a conservative, tight-fisted approach to service delivery, as evidenced by its track record over the last 25 years. To that end, the Board recommends establishing a foundation of \$3.0 million, to support the new facility and service delivery model. The investment in our center by our community needs to recognize the dual need for both the building and the services to be generated from it.

At the core of this initiative for a new center is the ability to continue to deliver much-needed services to a rapidly growing segment of our community. The new facility will have a portico so that meals on wheels can be loaded safely and efficiently by our many volunteers. We will be able to offer services in the home seven days a week, instead of five, as we currently do. This is critical, particularly to the older elderly (those 85 and older) who count on the Senior Center to be able to function reasonably well at home. The Center will also have the added capacity to increase its volunteer network and add a much-needed registered dietician.

V. Oversight & Accountability

An Investor Relations Committee will be established and tasked with the responsibility to keep investors fully informed as to how construction of the new facility and the programs being delivered are progressing.

Investments in the campaign will take the form of pledges payable over a three-year period or less. In-kind services are acceptable as commitments to the program as long as they are services that would normally be purchased with program funds. Investments in the program may be deductible under IRS code 501(c)(3). The Senior Center and Foundation are 501(c)(3) charitable organizations as recognized by the IRS. Individuals or corporations may make a charitable tax deduction by investing in the new Senior Center. All investors should check with their financial advisors regarding the deductibility of their pledge payments.

VI. Conclusion

The Young at Heart Senior Center must continue its commitment to serving the public via services and programs offered at the Senior Center and in-home delivery. In order to maximize its implementation and impact, a new facility is urgently needed. To be successful, we must secure investments from all those with a stake in making Rock Springs and Sweetwater County a better place to live, work and visit. For this program to succeed, we also know this effort must achieve "urgent priority" status among those who will be asked to fund its implementation. To that end, we encourage your candid and objective feedback to this proposal, its implementation, and its desired outcomes.

I. Construction of New Facility	\$6,000,000
II. Foundation/Endowment	<u>\$3,000,000</u>
Total Three-Year Goal	\$9,000,000

**List of Interviewees
Young at Heart Senior Citizens Center
Rock Springs, Wyoming**

Linda Acker
Director
Southwest Counseling Service

Mark Anselmi
Manager
Best Western Outlaw Inn

Gary Antonino
Supervisor Operations
Questar Regulated Services Co.

A. L. Barrier M.D.
High Desert Otolaryngology

Ray Black
Retired

Sam Blackwell
Retired

Josette Bott
Manager
Casper Oil Tools

John R. Bunning
Vice President- Sales
Red Horse Oil Company, Inc.
Get N Go Convenience Stores

Al Carollo, Jr.
Owner
Sweetwater Cable Television
Company, Inc.

Sonny Carrier
MIS Director
Sweetwater County Computer
Department

Michael A. Ceballos
President- Wyoming
Qwest

Grant Christensen, DDS
State Dentist
State of Wyoming Department of Health
Dental Programs Division

Bernadine L. Craft, Ph.D.
Executive Director
Sweetwater Board of
Cooperative Educational Services

Holly Dabb
Publisher- Daily Rocket-Miner
Rock Springs Newspapers, Inc.

JoAnn Dayton, CPS
Administrative Assistant
OCI Wyoming, L.P.

Mae Dykes
Retired

Ron Engelhart
Market President
Bank of the West

Mike Evans
Manager
Albertson's

William G. Fabian
Chief Executive Officer
North Side State Bank

Diane Farrell
Human Resource Manager
Sweetwater Ford

Louise Fedrizzi
Retired

Vicki Haggit
Office Manager
Key Energy Services, Inc.

Bettye Hamm
Retired

Governor Hamm
Retired

Dave Hanks
Director
The City of Rock Springs
Chamber of Commerce

Mary Hardy
Retired

Richard M. Hartman
Special Representative To The
President
Union Pacific Railroad

Mary Hay
Ranch Owner

John W. Hay III
President
Rock Springs National Bank

Ted S. Higgins
President/CEO
Communication Technologies, Inc.

Ron Hughes
General Manager
Solvay Chemicals, Inc.

Guy Hulsey
Facility Supervisor
Support Services
Halliburton

Kathy Johnson
Store Manager
Ace Hardware

Wayne Johnson
Retired

Honorable Timothy A. Kaumo
Mayor
City of Rock Springs

Tom Kershisnik
Retired

Honorable Neil Kourbelas
City Councilman
City of Rock Springs

Ludwig F. Kroner, III M.D. P.C.
Orthopedic and Fracture Surgery

Mark S. Kurtz
Manager
John Bunning Transfer Co. Inc.

Rick Laurentius
Plant Manager
Simplot Phosphates LLC
J.R. Simplot Company

Richard H. Lee
Business Relationship Manager
Wells Fargo Bank
Site Manager – Rogers
Kennametal Inc.

Gina Macilwraith
Site Manager
Monsanto Company

Bruce A. Macy
Owner
Macy's Truck Repair, Inc.

Honorable Marty Martin
State Representative
House District 48
State of Wyoming

Bob McCaskill
Retired

Pat McFadden, Jr.
I.T. Manager
F. B. McFadden Wholesale Co.

Wayne Moses
Owner
Rock Springs Honda-Toyota

Craig Nelson
Regional Community Manager
Pacific Power

Paul Oblock
Schoolteacher

John D. Pallesen
Chairman
Board of County Commissioners

Fred Parady
YAHSCC Board Member

Duce Piaia
Retired

Chuck Radosevich
Assistant County Engineer
Sweetwater County

Louis Ruffini
Retired

Angela M. Shutran
Branch Manager
US Bank

Jack Simmerman
Owner
Teton Distributors, Inc.

Robert M. Spicer
President
Western Wyoming Beverages

David Tate
Compliance Manager
Trona Valley Community
Federal Credit Union

Spiro Varras
Retired

Jeanne Walker
Employee Relations Manager
FMC Corporation

Ted Ware
President
American National Bank
Rock Springs

Andria L. Whisler
President
Whisler Chevrolet Company

CONFIDENTIAL QUESTIONNAIRE

Young At Heart Senior Center
Rock Springs, Wyoming

Interviewer _____ Interview # _____

Date _____ Time Start _____

Individual____ Business____ Foundation____ Board member? _____

Length _____ Advisory Board member? _____

Name _____ Title _____

Firm _____ Ph _____

Address _____

Directions/Parking _____

Notes/Background _____

Interviewer's Assessment:

Attitude: _____ Highly committed _____ Positive _____ Moderate

_____ Noncommittal _____ Negative

Financial Indication: Low \$ _____ High \$ _____

Leadership Role: _____ Yes _____ Maybe _____ No

Door Opener: _____ Yes _____ Maybe _____ No

Notes: _____

(PREFACE INTERVIEW WITH CONFIDENTIALITY REMINDER)

1. How familiar are you with the services provided by the Young at Heart Senior Center?
☐ Very ☐ Somewhat ☐ Little/Not at all

- 1a. Have you or anyone in your family use/used services provided by the Center?
☐ Yes Frequency? ☐ No

- 1b. How did you hear about the Center?

- 1c. What is/was your general overall impression?
☐ Favorable ☐ Somewhat Favorable ☐ Needs Improvement

2. How would you rate the effectiveness of the staff at the Center?
☐ Excellent ☐ Good ☐ Poor ☐ Unsure

3. How would you rate the effectiveness of the Board of Directors?
☐ Excellent ☐ Good ☐ Poor ☐ Unsure

Present Prospectus – take an appropriate amount of time, depending on the prospect's stated familiarity with the materials.

This Prospectus reflects the Center's plan for construction of a new facility to meet current/future needs, streamline operations and establish an endowment/foundation. Total cost for completion and to ensure adequate endowment funding is estimated at \$9 million.

- Land will be in-kind
- Programs and operation are financed through existing resources.

- Foundation/endowment resources will be used to offset future program/operational/maintenance.
4. We want to get a sense for what the potential financial support will be for constructing this new facility and ensuring its' long-term viability. In your opinion, how would you characterize the business community's regard towards a project such as this?
- _____ Highly Favorable _____ Somewhat Favorable _____ Not in Favor
- _____
- _____
5. What is your overall assessment of the proposed plan?
- _____ Necessary/beneficial _____ Largely on target, needs refinement
- _____ Not on target _____ Unnecessary
- _____
- _____
6. Do you have any recommendations that differ from the Prospectus?
- _____ Yes _____ No
- _____
- _____
- _____
7. How would you rank this project on a scale of importance compared to your other philanthropic interests that you are currently involved in or have supported in the past?
- _____ High degree _____ Moderate degree _____ Low degree _____ No degree
- _____
- _____
8. On a scale of 1 to 5 (with 5 being most important), how would you rate the importance of each of the following:
- _____ Allowing seniors to age at home opposed to outside facilities
- _____ Deliver programs which allow seniors to maintain physical, mental and emotional wellbeing
- _____ Effective & cost efficient counseling and support services
- _____ Education on nutrition, employment, income maintenance
- _____ Social and volunteer opportunities
- _____ The Center as a civic asset

- 8a. Of these, which would you consider the most important to the area?

- 8b. Which would you rank the highest for the State?

9. (*Present Investment Table*) Experience shows that the following levels of financial investments are necessary to reach a goal of \$9 million over a three-year period. What companies, individuals, or foundations would be most likely to support this project at these leadership levels?

10. In your opinion, can \$6 million for construction and \$3 million for the foundation be raised for this project?
 _____ Yes _____ No _____ If no, how much could be raised?

11. Keeping in mind that this is not a solicitation and your comments are strictly confidential, at what level would you (or your firm) consider making an investment for the Center over a three-year period if the program is to your liking and the right people are leading it?
 None _____ Low \$ _____ High \$ _____

- 11a. If the Center were to initiate a capital campaign in April/May '05, would this present any foreseeable difficulties in terms of your ability to make a pledge decision?
 _____ Yes _____ No _____ Unsure

- 11b. What is the appropriate means for presenting a request to your organization?

- 11c. How quickly could you or your organization make such a decision?

12. Is there anything about the project that would have to be changed to get you (or your company/foundation) to consider a higher level of support? (longer payout)
 _____ Yes _____ No _____ Unsure

13. The Center will offer a variety of naming opportunities as public recognition for significant investments. Would you or your firm be interested in this type of opportunity?
 _____ Yes _____ No _____ Unsure

14. If the Senior Center fails to raise the funds privately, would you be supportive of a sales tax initiative? _____ Yes _____ No _____ Unsure

15. Whose names come to mind to lead this effort if a campaign were to take place?

- 15a. Of those named, who would make the most effective Campaign Chairperson?

16. Would you be willing to be a "door opener" to help us set up an appointment?
 _____ Yes _____ No _____ Maybe

17. If asked, would you be willing to serve in a leadership position?
 _____ Yes _____ No _____ Maybe

18. Do you serve on any for-profit or non-profit boards? _____ Yes _____ No

19. Are you aware of any competing campaigns (*in progress, just completed, or pending*) which might affect the level of support this program might receive?
 (Names of campaigns and goals)
 _____ \$ _____
 _____ \$ _____
 _____ \$ _____
 _____ \$ _____
 _____ \$ _____

20. Keeping in mind that our discussion is strictly confidential, are there any other factors which you feel might influence the outcome of the campaign or do you have any other comments concerning this project that we did not discuss?

21. Is there anything else that the Center should do that might cause you to invest/elevate your investment in the proposed program?

_____ Yes _____ No _____ Maybe

Thank you!

End time _____

**Minimum Investment Levels Necessary to Guarantee
A Campaign Goal of \$9 Million**

Pledge Amount	No. of Pledges at this Level	\$ Amount this Level	<-----Cumulative----->	
			No. of Pledges	Pledge Total
\$2,000,000	1	\$2,000,000	1	\$2,000,000
\$1,000,000	1	\$1,000,000	2	\$3,000,000
\$500,000	2	\$1,000,000	3	\$4,000,000
\$250,000	3	\$750,000	6	\$4,750,000
\$150,000	4	\$600,000	10	\$5,350,000
\$100,000	10	\$1,000,000	20	\$6,350,000
\$50,000	20	\$1,000,000	40	\$7,350,000
\$25,000	30	\$750,000	70	\$8,100,000
\$10,000	45	\$450,000	115	\$8,550,000
Under \$10,000	Many	\$450,000	250+	\$9,000,000