

SQUARE ONE OLDER ADULT CENTRE - A CASE MODEL FOR PARTNERSHIP SUCCESS THE CITY OF MISSISSAUGA

Notes from a presentation to the CPRA/PRO Power to Connect Conference, Aug 19-22, 2001

HISTORY

Context

- seniors demands in late 80's
- rapid population growth; ethnic diversity
- 1990 study: 1) build by 1998, 2) partner c/o private facilities

Square One Shopping Centre Opportunity

- 10,500 square feet
- auditorium/stage (197 capacity), lobby, cafeteria, washroom's, 9 rooms
- 5 year lease in 1992 to recover utilities

Start up Funding

- City (\$35,000) plus 1 staff
- \$60,000 (Feds, Province, Lions,
- \$10,000 in furniture/equipment (2 seniors clubs)

How We Began

- 1992 Steering Committee
- Open House - 800 attended
- 3 days/wk; 3 ethnic partner groups, 1,050 members @\$5 ('93)
- first f/t staff in '94; 2nd in '96
- rapid evolution of services, org structure, revenues

Shared Facility Responsibilities:

- **City** - initial renovations; admin (lease, rentals, cleaning, phones); surplus furniture; elevator card reader system
- **Shopping Centre** - repairs (structural/electrical); security; donated storage space; converted "parlour" to Board room
- **OAC Board** - establish/issue keys to volunteers; purchase all furnishings & equipment & installations (rugs, tiles, safe in wall, cupboards, shelves, paint, etc); convert all small rooms

3. Present Highlights Include:

- 1. 1,400 members, 7 day a week operation**
- 2. 6 ethnic seniors clubs, whose members are largely integrated & represent 1/3 of members**
- 3. 62,000 annual gross attendance to 50 weekly programs, 107 annual events/trips**
- 4. 25,000 annual gross attendance to community rental programs (100 clients)**
- 5. weekday cafeteria with affordable menu**

6. **147 registered volunteers who donate 22,000 hours/year (= 12.5 full time staff)**
7. **3 full-time staff jobs and 20 part-time jobs**
8. **today operates self-sufficiently of City funding, \$270,000 break-even budget, with service levels equal to City-operated Mississauga Seniors Centre**
9. **City's role reduced to primarily advisory; saved \$10 million capital and \$400,000 annual operating**

4. OPERATING PRINCIPLES GUIDING THIS SUCCESSFUL “COMMUNITY DEVELOPMENT / PARTNERSHIP APPROACH”:

- **a “CD approach”** - enables access to unlimited resources (the only limit is one's shyness to ask)
- **“a Centre to be operated ‘by and for’ older adults”** (empowers responsibility and authority, with policies/procedures developed as needed)
- **“democratic leadership style”** - City staff role as a non-voting chairman/secretary and initial supervisor of paid staff
- **“build the organization from the centre out, and start with a carefully selected small mgmt cmtee”** - enables quicker trust and consensus on vision, core values, decisions
- **“relationships require time to develop”** (5-year lease agreement)
- **donors/partners will “give” more readily to volunteers than to governments** (“we already pay taxes”)
- **incorporation of the volunteer organization**
- **“core foundation funding from founding partners essential to inspire others”**
- **“a mutual benefits approach is essential for all partner's”** - City saves huge capital and operating budgets while fulfilling mandate; Shopping Centre receives 87,000 visitors annually
- **“appealing to older adults”, thanks to:**
 - perceived as **“safe”** by seniors (well-lighted parking, professional security staff)
 - **easy access** by transit
 - **“welcoming”** approach by fellow senior volunteers trained in customer service
 - marketed to **“older adult”** rather than “seniors”, **55+** instead of 60+
 - user-pay, cost-recovery approach sold **“by seniors to seniors”** (harder for gov't)

- “a Centre planned to promote multicultural integration”
- “manage volunteers like staff”
- “a caring community” - “like entering someone's home”; no thefts or vandalism in 9 years
- “a continuing City staff advisory liaison role at Board meetings” - to ensure balance and continuous integrity

Square One Older Adult Centre
5(A) Shift of Responsibilities from Municipal to Community Base

†

	<u>1992-1993</u>			<u>Present</u>	
	City	Centre		City	Centre
Lease/ Liability Insurance	✓			✓	
EPC Grant/Tax Receipts	✓			✓	
City Operating subsidy (printing, supplies etc)	✓				✓
City Administrative Support (rentals, payroll, contracts, purchasing)	✓				✓
Chair/Sec/Staff Supervision Roles	✓				✓
Budget	✓				✓
Facility Renovations	✓				✓
Policies/Procedures/ By-laws	✓				✓
Day to Day Operations (Programs, mem's, vol's)		✓			✓
Fundraising		✓			✓

Square One Older Adult Centre

5(B) Shift of Authority from Municipal to Community Base - " 3 Phases"

Steering Committee
1992-'93

Appointed Interim Board
1994-'98

Self Governance Board
1999 to present

City staff Role and % of time	Non-voting Chair/Sec/Overall Manager (80-90% of staff time)	Non-voting Chair/Sec/Staff Supervision (50-60% of staff time)	strong advisory to Board (10-20% of staff time)
Management Committee Size	City & 5 appointed Vol's	City and 5 appointed Directors ('94); 8 in '97 (applic./interview)	10 elected Directors; (Chair supervises Executive Director)
# of F/T Centre Staff	0	2 (Centre Supervisor, Program Supervisor)	3 (add Admin. Assistant); Exec. Director manages staff & operations
Standing Committees, Volunteers, ethnic groups	4 committees, 30-40 vol's, 3 groups	6 committees, 100-110 vol's, 6 groups	10 committees, 147 vol's, 6 groups
City \$ contributions	\$10,000 renovations; (one-time) & \$25,000 operating	\$0 operating by '98	\$0
Organizational Highlights	adopt mandate, minutes; early policies/proc's	introduce; policies + proce's, bylaws, budgeting, audit, organization structure, AGM, incorp, rental program	- annual Board Retreat Meetings - 3 year Strategic Plan - Trillium grant supports 3 rd f/t staff position
Participation Stats	1,050 mems, 20 programs, 5 days/wk, 30 events/yr	1400 mem's, 43 programs, 7 days/wk, 80 events/yr, 70 rental clients/yr	1400 members, 50 prog's/wk, 105 events/yr, 100 rental clients/yr

Square One Older Adult Centre

Mission Statement

A Centre to provide Social, Health, Educational, and Recreational Opportunities operated by and for Mississauga's Older Adult Residents who are 55 or more years of age in order that the quality of life of its members be enhanced.

Objectives

- 1) To provide **accessible, affordable, and appropriate** social, recreational, educational and fitness programs, in an effort to enhance physical and mental capacities of members.
- 2) To promote a "**family**" sense of community amongst all members, promoting friendships and community networking, thereby reducing the impact of social isolation for adults living alone.
- 3) To encourage and maintain a **healthy multicultural** environment to support cultural integration and participation in all Centre activities.
- 4) To foster **leadership** and a sense of **self worth** and **dignity** for older adults.
- 5) To promote principles of **good citizenship**, thereby encouraging **tolerance**, mutual **cooperation**, and **respect** between and amongst all members.

PROGRAMS

- PROGRAM OBJECTIVES
- DEFINITION OF PROGRAM TYPES

Pre-registered Programs and Drop-in Programs:

- NEW PROGRAMS
- PROGRAM FEES
- EVALUATION OF PROGRAMS
- PROGRAM INSTRUCTORS/LEADERS

Volunteer Leaders and Paid Instructors

SPECIAL EVENTS AND FUND RAISERS

PROMOTION AND MARKETING

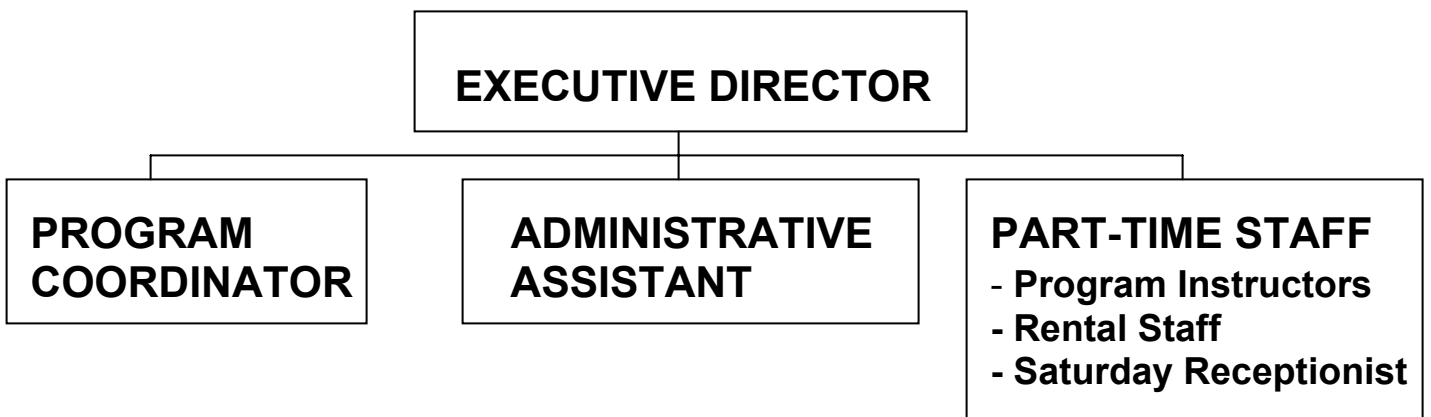
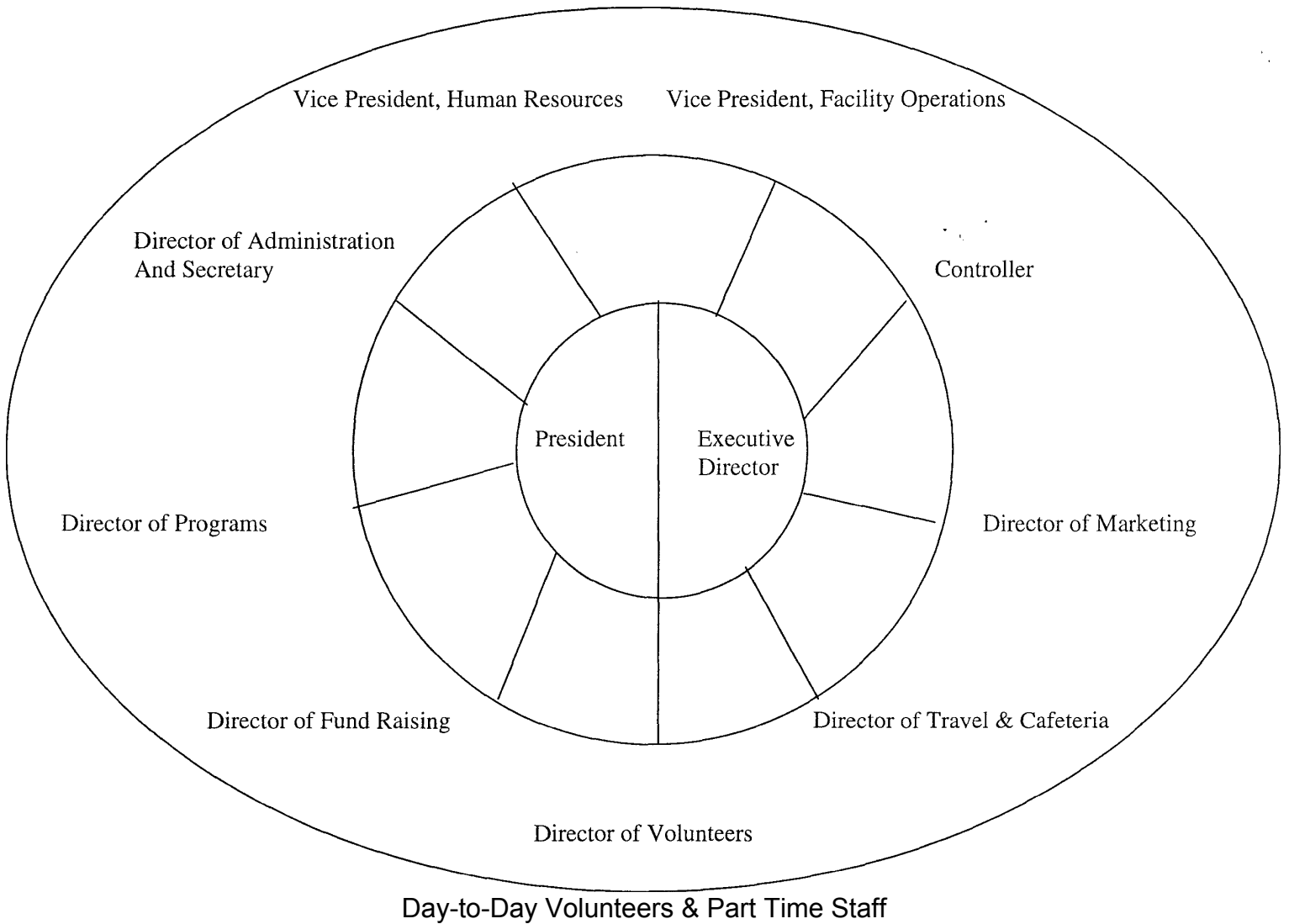
VOLUNTEER PROGRAM

- PRINCIPLES OF VOLUNTEER MANAGEMENT
- VOLUNTEER ROLES
- JOB DESCRIPTIONS
- VOLUNTEER PROCEDURE MANUAL
- VOLUNTEER TRAINING
- VOLUNTEER RECOGNITION

MULTICULTURAL INTEGRATION

- highly integrated "family" atmosphere; "0" toleration for discrimination
- 6 ethnocultural groups, 5 are "members" - 1/3 of overall members
- visible integration began with trips & events, then with programs
- Mississauga's first Goan, Caribbean, and Vietnamese seniors clubs were helped to develop at Centre
- Vietnamese club rents, & operates programs for all ages in own language
- Filipino rental parties are big source of income (also encouraged by hosting Philippines Pavilion in "Carassauga Festival")
- 3 of 6 cultural identities represented in Board of Directors
- Clubs' programs operated in English are listed in Centre flyer, hence 2-way integration
- weekends more appealing to most club members, and family volunteers are encouraged
- Xmas International Lunch event a huge annual integrating experience, also generates profits for the Centre!

Square One Older Adult Centre "Management Model"



STANDING COMMITTEES

- TRAVEL
- CAFETERIA
- PROGRAM
- SPECIAL EVENTS
- ADMINISTRATION
- PARTNERSHIP OPPORTUNITY
- PARTNER GROUP LEADERS
- FINANCE
- VOLUNTEER - FACILITY

ONE EVENT COMMITTEES

- INTERNATIONAL LUNCH
- CRAFT SALE
- BRIDGE TOURNAMENT
- WALK-A-THON

Financial Statements - Principles

- Operate on a sound financial basis with a balanced budget or a small surplus
- Prepare an annual budget and have it approved by - the Board of Directors
- Prepare monthly and quarterly Financial Statements for the Board of Directors
- Investigate/ explain significant variances from budget
- Be aware of the Risks and Opportunities within your budget and track them at least quarterly
- Have a diversity of sources of revenue
- Monitor changes in the sources of revenue and ensure shortfalls in one are replaced as soon as possible
- Build a reserve over time = to 3 or 4 months expenses

Square One Older Adult Centre Summary of Financial Statements from 1997 -2003

	Act. Year 1997	% of Total	Act. Year 1999	% of Total	Budg. Year 2001	% of Total	Budg. Year 2003	% of Total
Revenue (000)								
Program Revenues	44	27%	68	33%	72	27%	76	28%
EPC Grant	29	17%	29	14%	29	11%	29	11%
Govt. Grant	4	2%	0	0%	25	9%	0	0%
Memberships	17	10%	20	10%	24	9%	28	10%
Special Events	16	10%	19	9%	29	11%	35	13%
Room Rentals	39	23%	45	22%	52	20%	58	21%
Travel/Cafeteria Com.	8	5%	15	7%	17	6%	19	7%
Corporate Donations	6	4%	5	2%	10	4%	16	6%
Members Donations	3	2%	3	1%	7	3%	9	3%
Total Revenue	166	100%	204	100%	265	100%	270	100%
Expenses								
Salaries and Benefits	81	53%	119	61%	170	65%	187	65%
Lease	17	11%	18	9%	19	7%	21	7%
Cleaning	15	10%	20	10%	23	9%	24	8%
Printing	1	1%	4	2%	6	2%	7	2%
Program Supplies	2	1%	6	3%	9	3%	10	3%
Special Events	10	7%	8	4%	10	4%	12	4%
Volunteer Recognition	3	2%	5	3%	5	2%	5	2%
Administration	10	7%	12	6%	17	6%	18	6%
Capital Purchases	13	9%	2	1%	4	2%	4	1%
Total Expenses	152	100%	194	100%	263	100%	288	100%
Total Surplus	14		10		2		-18	

August 2001

Opportunities

- **Older Adults are a growing segment of our Community**
 - **more potential members**
- **We are located in 3rd largest shopping mall in the country**
 - **location, location, location**
- **New Funding opportunities from the Ministry of health for Community Wellness programs**
- **Attract new younger recently retired persons as leaders or teachers**
- **Develop A Planned Giving Program**

Challenges

- **Current space is close to capacity**
- **Threat to continuity of lease if shopping centre changes ownership or policies**
- **Withdrawal of EPC Grant by Government**
- **Find new corporate donations to replace fixed, declining or eliminated government funding**
- **Keep abreast of new government programs**
 - **as possible sources of Revenue**
- **Maintain a balance budget so that we can retain our third staff person**
- **Ensure programs offered meet members changing needs**



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