

Planning for Sustainable Shorewood Senior Services

March 7, 2024



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Executive Summary

The data overwhelming supports the need for continuing the Senior Resource Center (SRC). The data indicate that the development of the Senior Resource Center and supporting an age-friendly community culture will provide a significant return on investment in the quality of life for our older residents and the community at large. Elder Services Advisory Board (ESAB) is recommending some cost-effective ways to meet the needs indicated by older adults and caregivers while being mindful of Shorewood taxpayers. The recommendations foster the development of effective service partnerships and financial partnerships.

Recommend the Senior Resource Center develops a Benjamin Center including a lounge for older adults to gather and shared office space that integrates departments serving older adults. The current **Health Department** space when they vacate in spring 2024 would provide offices for confidential conversations, focusing on tasks with fewer interruptions and synergy between departments focused on improving the lives of older adults in Shorewood. SRC Director would begin to work with an architect or designer to explore options for renovating space in the lower level of the library to create a Benjamin Center lounge. One option would be combining the current SRC and Spector Center conference room into a large welcoming space for a social interactions and smaller programs. The data collected indicate a comfortable space for social interaction with peers was unanimously desired and is important in reducing social isolation, a major health concern.

Maintain a credible and trusted information and referral source. A qualified person is necessary to help older residents and care providers with the guidance needed to access important resources to stay in their home, find transportation to medical appointments, understand Medicare options, and many other transition or crisis services. The Benjamin Center Director would be a “go to” person for information and referral, working closely with the new Case Manager position with the Health Department. Yet, there can be many portals to access information. Recommend a librarian receive training as Older Adult Information and Referral Specialist with certification by Inform Wisconsin as another “go to person” for researching common and specialized needs along with offering a warm handoff to East Side Senior Services or other services.

Offer more programming through the Recreation Department and collaborations to meet the needs of older adults, caregivers, those near retirement, and people looking for new friends or exploring interests. Programming could expand into the early evening hours and weekends. Begin to transition programming to the Recreation Department and continue to build collaborations with other organizations offering services to older adults.

Encourage policy changes to include an ESAB member or designee position on boards to advocate for older adults and integrate age-friendly goals across departments. Start with the Library Board and Recreation Board, and after reviewing success, add the Planning Commission.

SHOREWOOD Senior Resource Center
ESAB's Focus Group and Survey Data Summary
January 2, 2024

Purpose

The purpose of this Senior Resource Center (SRC) Planning for Sustainable Shorewood Senior Services report is to identify, discern and understand the critical characteristics of the Senior Resource Center as related to the needs of the older adults within our Shorewood community. The qualitative and quantitative evidence for this report was derived from focus groups and survey data from older adult Shorewood residents and caregivers. In addition, the professional research literature on older adult physical and psychological requirements for health and well-being lends further support to the data and results. Therefore, the culmination of this data, combined with the research literature, provide the evidence to reliably inform the Elder Services Advisory Board's (ESAB's) recommendations for the aging resources needs, partnerships and long-term sustainability of the Senior Resource Center.

Background and Significance

Living (and aging) well is essential to live longer and critical to longer life expectancy (Dawes, Pool, Caralambous, Cote, David, et al., 2023). The National Institute on Aging (NIA) (2022) identified actions that influence healthy aging, which include: exercise/physical activity; health behaviors such as seeing your health care provider; nutrition; and mental health and well-being. These health behaviors, among others, enhance higher levels of independence and quality of life (NIA, 2022). Physical activity is the cornerstone of healthy aging and overall well-being (NIA, 2022). This is synergistic with mental health and wellness, which is essential to overall health and quality of life (NIA, 2022). Mental wellness affects how a person thinks, feels, socially and physically acts, engages, makes choices and relates to others (NIA, 2022). Making new social contacts is associated with increased physical activity and wellness, thereby mediating the health risks (faster cognitive decline, increased risk of Alzheimer's disease, greater risk of heart disease, more chronic lung conditions, depression, metabolic disorders) associated with social isolation and loneliness (NIA, 2022; Schrempft, Jackowska, Hamer & Steptoe, 2019).

A sense of general well-being measures a person's subjective perceptions that life is good (Dawes, Pool, Caralambous, Cote, David, et al., 2023). It becomes ever more critical that well-being is identified as a priority when considering that the aging population is occurring at an unprecedented speed and gathering momentum. The over aged 60 older adult population is expected to increase by approximately 40% between 2019 to 2030, from 1 billion older adults to 1.4 billion and more than double to 2.1 billion by 2050 (Chung, Namgung, Hoon Lee, Choi, Choi, et al., 2023, Who, 2022). Those persons 80 years and older are expect to reach 426 million (WHO, 2022).

The tsunami effect exerted by the fastest growing age groups is also being experienced by Shorewood, WI., evidenced in the local, state and national data (Table 1). Census data for Shorewood, especially when compared to Milwaukee, Wisconsin and nationally (Table 1). This data is of great significance when considering that 24% percent of the Shorewood population is

aged 60 and older, and the poverty rate for those 65 and older is 16%. The Shorewood older adult population is more than 1.5 times the rate in Milwaukee/ Waukesha at 10%, and nearly double the rate in Wisconsin of 8%. The national rate is 17.3%. Looking at the census trend for Shorewood reveals a very large and growing older adult population from 14.4% in 2000 to 15.7% currently, that choose to live in this one square mile village. (U.S. Census, 2000, 2023). These statistics are significantly concerning and of the utmost importance for the consideration of planning and resource utilization for the Village of Shorewood.

The aging human experience can pose challenges to well-being and longer life expectancy. For example, social isolation and loneliness was experienced by individuals, from young to old, during the Covid pandemic. Social isolation is defined as an objective (rather than subjective) state that is lacking in interactions with others and the wider community (Oppert, Ngo, Lee, Billingham, Banks & Tulson, 2023). Whereas loneliness is a complex set of feelings, perceptions and experiences that occur when intimate and social needs are inadequate to meet individual needs (Oppert, Ngo, Lee, Billingham, Banks & Tulson, 2023).

With every age group during Covid, there were social isolation and loneliness challenges that led to increased illness and death (morbidity and mortality). For older adults, the most severe health impacts of social isolation and loneliness include cardiovascular and mental health (Oppert, Ngo, Lee, Billingham, Banks & Tulson, 2023). Oppert, Ngo, Lee, Billingham, Banks & Tulson (2023) point out that the outcomes go beyond the physical and mental outcomes but, that they are also public issues and economic problems (increased health care and service use). Social isolation and loneliness potentiate significant vulnerability for individuals and communities.

Social connectedness can provide a multitude of beneficial outcomes for older adults and the community. The World Health Organization (WHO) recommended interventional strategies to address the negative health outcomes of social isolation and loneliness. Some of these include face-to-face interactions, digital interventions, befriending, etc. ((Oppert, Ngo, Lee, Billingham, Banks & Tulson, 2023). In addition, strategies at the local level and national levels include improved infrastructure, laws, policies and promotion of age-friendly communities that should be scaled up ((Oppert, Ngo, Lee, Billingham, Banks & Tulson, 2023).

The Shorewood Resource Center addresses many of the issues and health prevention and promotion strategies identified by WHO, AARP and research that have gone beyond addressing social isolation and loneliness, but include the physical, psychological and social holistic well-being of the older adult within the community. These, in turn, ultimately impact the community health, resource utilization and economic well-being. That is, health and well-being leads to reduced costs, resource utilization, and negative social and fiscal impacts for the community.

Table 1. Shorewood Older Adult Population and Education Compared to Milwaukee, State and National Census Data

Shorewood Population:	Area Population:
Older Adults (60 and older):	Poverty level for those aged 65 and older:
2022 - 24%	<ul style="list-style-type: none"> • Shorewood: 16% • Milwaukee-Waukesha: 10% • Wisconsin: 8%
2021 - 23%	

	<ul style="list-style-type: none"> Nationally: 17.3% Over 250 older adults in Shorewood live in poverty.
<p>Shorewood Education Level: 2022 - 77.3% bachelor’s degree or higher</p> <p>2021 - 78.5% bachelor’s degree or higher</p>	<p>Area Education Level: Bachelor’s degree or higher:</p> <ul style="list-style-type: none"> Shorewood: 77.3% Milwaukee-Waukesha: 34.4% State of Wisconsin: 33.2% Nationally: 35.7%

<https://censusreporter.org/profiles/16000US5573725-shorewood-wi/>
<https://data.census.gov/all?q=national%20education>

Participant Sample and Data Collection Procedure

The ESAB surveyed older adults and families of older adults within the Village of Shorewood. To ensure the greatest capture of older adults and older adult caregivers, an on-line survey, excluding demographic data collection, was conducted and six focus groups including demographic data collection was performed. These participants were identified by social media, Manager Memo newsletters and email campaign. All participants were informed of the confidentiality of their statements and survey data.

The participant sample procedure included providing information for 3 weeks in the Village Manger’s Memo. An explanation of the survey and focus groups was provided. A link to the on-line survey was provided, as well as procedure for joining the focus groups. ESAB members provided informal verbal information regarding the focus groups and on-line survey to community members, as well as an email was sent to neighborhood email lists. Appendix A includes the Village Manager’s Memo and email invitation.

Description of Participants

The participant sample was of adequate and sufficient size and included 27 people who attended six focus groups and 73 people who responded to the on-line survey. Table 2 summarizes the participants demographic data. The focus group participants were current Shorewood residents aged 50- 84, of which 87.7% of them were age 60+. One participant was not a resident, but was caring for a current resident.

Two participants identified as persons of color and the remaining identified as white. Seven (25.9%) of participants are currently caregivers for a parent, spouse/partner, or friend, 10 (37%) have been caregivers in the past and 10 (37%) have not been caregivers for older adults. The participants generally stated they signed up for the focus groups for one or more of three reasons – experiencing self and/or family members aging, work backgrounds with older adults, and/or “I have opinions to share.”

TABLE 2 Description of Participant Sample

	Online Survey n=73	Focus Groups n= 27
Age range 60+	87%	96.3%
Less than 50	2.7%	<50 - 0
50-54	4.1%	50-54 - 1
55-59	5.5%	55-59 - 0
60-64	6.8%	60-64 - 4
65-69	13.7%	65-69 - 0
70-74	23.3%	70-74 - 7
75-79	30.1%	75-79 - 8
80-84	11%	80-84 - 7
85-89	1.4%	85-89 - 0
90-94	0%	90-94 - 0
>94	1.4%	>94 - 0
Ethnicity	Data not collected	White – 25 (92.6%) Hispanic / Latinx – 0 Black / African American - 1 Native – 0 Asian/ Pacific Islands – 0 Other - 1
Current Shorewood resident	98.6% 1 former long-term resident	100%
Caregiver - currently for someone over age 60	25 = 35%	7 = 26%
Caregiver – In the past for someone over age 60	13 = 17.8%	10 = 37%

Results

Participant Data

Data resulted in 6 major categories with subcategories (Table 3). The full data set is included in Appendix B. These categories provide rich data and reveal the older adult health and wellness/well-being needs to promote holistic health; and to prevent morbidity, mortality, and avoidable costly community emergency resource utilization. The categories are interdependent and provide the older adults needs in relationship to the Shorewood Senior Resource Center. In the following sections, the categories will be described with participant quotes serving as the qualitative data evidence. The on-line survey and focus group data are combined in the following presentation, except where otherwise noted for added clarification.

The phrases and statements directly stated by the participants are bold, italicized and in quotation marks within the text.

TABLE 3 Description of Questions and Responses

Questions Posed/Explored	Survey Data (Quantitative data based on 5 pt Likert scale)	Focus groups (Qualitative data verbal responses)
“How important are the SRC information and referral services for the Shorewood community?”	4.48 / 5 - very important	Every group discussed the credible and trustworthiness of SRC Director for information and referrals.
Top “helpful or important” services	<ul style="list-style-type: none"> • Transportation/rides 62% • In home assistance or home modification 60% • Medicare and insurance options 52% 	
“How important are the SRC programming for the Shorewood community?”	4.58 /5 very important	The programming appeared to be vital for many people in building connections, reducing isolation and engaging their body and mind.
Top interest areas	<ul style="list-style-type: none"> • Clinical services (vaccine, toenails, memory screenings) 71% • Exercise/fitness classes 67% • Health and wellness classes (nutrition, fall prevention, brain health) 63% 	
Shorewood Connects	4.31 / 5 very important	Several people reported they appreciate the yard clean up and safety advocacy.
Top “important”	<ul style="list-style-type: none"> • Fall yard clean up 85.9% • Safety and accessibility advocacy 84.5% • Memory Café 71% 	

Significance of SRC

The groups identified the importance of the Senior Resource Center to those that use it and those that rarely use it. The participants found the SRC to be very important with an average rating of 4.48 on a 1-5 Likert scale, with 5 being very important. "Programming" was identified as very important with average of 4.58 and Shorewood Connects with an average of 4.31.

One participant explained how quickly one's life circumstances change with changing environmental impacts exerted by COVID, outside of a person's control. ***"The Pandemic and my 80th Birthday overlapped. All of a sudden, I felt old. I thought about the yard clean up and suddenly realized I could now be a customer."***

The Senior Resource Center was especially important when experiencing personal loss and isolation as a result of a move to the area, retirement, death of a spouse or friend necessitating new ways to interact with new people, make new social acquaintances/friends and explore opportunities and activities. ***"After retirement I was single and alone, my children live in different states, so I started coming here and it's been a wonderful place to come."***

Another participant expressed, ***"I lost 15 friends during the pandemic. There was no longer anyone to come to my annual party. With the Senior Center, I can still connect with people."***

Spending time with other people was expressed by many participants as one person identified the critical role that the Senior Resource Center provides to reduce isolation and promote well-being. As one participant emphasized, ***"The Senior Resource Center is important as people age. Their friends move away or pass away, the world changes and becomes less familiar as people get older. The Senior Center can be important as a resource as connections begin to break down."***

All participants, with the exception of two participants, provided exemplary praise and acknowledgement regarding the attitude, behaviors and actions by Elizabeth Price, Director of the Senior Resource Center. Participants provided praiseworthy comments. Participants generally agreed on most positive sentiments such as: ***"Elizabeth is gem." "Elizabeth is very keyed into the Village overall. She goes to meetings and advocates for older adults and shares with us what is happening in the Village."***

Two persons made singular negative comments in regard to the Director's behavior and attitude, which included: ***"Director was unkind, stubborn, not welcoming to the point of rejecting people with special needs."*** Another participant stated, ***"I felt unwelcome. My camera was off for better connectivity, and I was told I wasn't welcome if my camera was off."***

Socialization

The participants freely identified strategies for socialization and the need to increase opportunities and space for socialization and meeting others. An older adult "gathering place" for informal conversations and social gathering was identified by every group with overwhelming individual wholehearted agreement. One group nicknamed it ***"A place like Cheers, where you could sit and visit."***

People wanted a place to gather and made suggestions such as coffee, games, conversations, or ***“just to be around others”***. As one participant added, ***“We can lose social and support groups over time, but we can also gain them.”***

Another strategy several participants identified for socialization and sense of belonging and intimacy was to “drop by” to chat with Elizabeth when they were at the library. As one respondent stated, ***“There’s consistency at SRC. I know there will be someone to talk to, even if just about the weather.”***

There was a general sentiment of appreciation of the friendly warm reception found at the SRC, as well as the opportunity for ***“old niceties.”*** ***“Seniors are some of the last people with time for ordinary niceties and it’s nice to have people to spend time with who enjoy using those old skills.”***

Information and Referrals

With transitions that occur with the aging process, there may be more vulnerability experienced and a need for assistance or resources to increase one’s personal safety, well-being and quality of life. As one person expressed, ***“I used services in the past for the person I cared for; very positive & welcoming experience.”*** Overall, the focus group participants made the distinction between those that needed more assistance with referrals due to their own individual transitional process or as a result of their caregiving role, in contrast to those that had higher levels of independence and/or had adequate resources for their current needs. Yet, frequently acknowledged, was the sudden shifts that can take place in one’s vulnerability.

The participants illuminated a myriad of current and potential concerns which included transportation, access to services, housing options, Medicare, home maintenance, remodeling, financial assistance, respite care, scams, among others. For example, some identified their lack of skills to search the internet for information. Others believed or had lived experiences that they could not get their questions answered adequately, especially through automated system(s). A recurrent heartfelt response was, ***“I wish I had someone to talk to. I want a live person, not an automated response. You just can’t ask questions in the same way online.”***

Websites, apps, and automated systems can be uncomfortable, confusing or overwhelming to use as a participant explained, ***“I’ve asked Medicare questions. It’s so much easier to talk to a person at Senior Resource Center than to navigate a phone tree.”*** And one person revealed that speaking with a live human is sometimes the only way to be heard and acknowledged. ***“Machines have trouble understanding you. As you get older sometimes your voice isn’t as powerful.”***

All participants wanted a credible, trusted individual to discuss individual needs and find referrals as they or their parents’ age, or they are tasked with helping a neighbor and are in need of more services. As one person disclosed, ***“Getting the appropriate referral, and knowing that you can trust it, can be challenging.”*** A frequent acknowledgement across the groups was ***“I run any information by Elizabeth, to see if it is trustworthy.”***

Talking with a someone who was empathetic, knowledgeable and understood common concerns would be able to provide the anticipatory guidance that was needed in the situation or issue. As one person shared, ***“This past year [dealing with health issues] I wasn’t sure what the questions were, until I talked with someone who knew the landscape.”*** Another person

stated ***“[We] Don’t want to be treated like a cipher/cog in the machine; we want information but also want a “touch” and some human interaction.”***

When people were or felt responsible to help/assist neighbors in need additional of services or questioned the physical and/or mental health and safety of an individual in the community, they approached and sought the help from the SRC. These participants conveyed that the SRC was responsive, empathetic, informative, and firm (providing firm boundaries). A statement that summarizes the sentiments of the groups is ***“Elizabeth is such a resource and a gem. She is knowledgeable and handles needs with sensitivity but also direct. She has a wealth of resources to explore.”*** Similar statements were repeated by many people regarding their own needs. In addition, the comments affirm the significant value of the SRC and the Director’s vast quality of knowledge, applied experiential practice and acquisition of reliable resources.

A common request from the SRC and the Director, was obtaining vetted reliable and economical snow removal, lawn care, and handyman resources. This is most notably by the comment, ***“Services that help seniors stay in their homes.”***

Participants identified trusted resources such as their friends/social circles, medical professionals, or reliable google sites like Mayo Clinic. Facebook and Next Door were used for local concerns and questions. As one person identified, ***“They may not be experts but you’ve had experience with their guidance through many aspects of life so you know if you can trust them.”***

The participants overall agreed that they would like information to be available in paper formats such as pamphlets and brochures to take home with them for easy readability, access and later reference. This was explained by a person’s statement, ***“[It’s a] nice alternative to looking on a screen, paper allows for note taking and easy reference.”***

Since the library was not identified by any participant as a place to go for information or services, a prompt was given by the facilitator. The prompt stimulated responses by participants about the books they independently chose or sought at the library, ie: novels or books that included in the title “... For Idiots”. The librarian as a resource was not mentioned by the participants or as a person of resource contact. Participants mentioned they would leave the library and go to the SRC for information, engagement and interaction since it is viewed and experienced as a trusted resource. One person stated, ***“Places like the library have this type of info but the Senior Center is a friendly, familiar place to get information.”***

Another person expressed, ***“I trust the people at the library but our needs with mom have been so specific I can’t imagine they could help, even if they were superhuman.”*** And then continued to share how helpful the Senior Resource Center was in answering questions and finding resources.

Programming

Every focus group identified the individual technology assistance and the toenail clinic as very beneficial, and a vital necessity. The comments shared by the participants were very complimentary and affirming. Participants appreciated the time and patience provided to them by these individuals and programs.

In regard to the technology assistance, several participants commented that the quiet space and focused attention in the Village Center was necessary due to hearing problems in large tech stores. ***“I wear hearing aides; I can’t hear or focus in a place like that [Apple or Best Buy]. When I come to tech support [at the SRC] it’s quiet and one-on-one and they are patient and present with me.”*** The technology support persons are younger and participants commented on the positive effect of the intergenerational aspect and interaction, as well as the empathy and anticipatory guidance provided. When the older adult didn’t know the questions, the tech support was able to provide them anticipatory guidance by telling them and suggesting what other information the older adult may need or want to know. Another participant expressed, ***“The volunteers take the time to make sure I understand. They follow up.”***

The toenail clinic is a service not widely, nor readily available, making it a valuable resource for the older adult and community. The social engagement, interaction and time spent with others while receiving safe, proper foot care also provides opportunity to gather other information as explained in the following comment, ***“Even the visit, itself, has its benefits beyond foot care.”***

Lifelong learning was a frequently identified as an immensely valuable resource service for health care prevention/promotion/wellbeing and personal future planning needs.. ***“SRC activities are ESSENTIAL for Shorewood older residents!”*** Participants noted the formal and informal nature of the various programs. Educational programs offered include programming on Medicare, “boosting the brain,” estate planning, documents essential for future planning and capturing an individual’s preferences and needs. Additional programs are social or explore interests. ***“Seniors come in all shapes and sizes, just like everyone else. That’s the tricky thing.”*** The participants identified the desire for classes on art/crafts; dance; local and national politics; history; day trips; strategies for self-agency and self-advocacy (“how to…” use car sharing, bus routes, apps.; health care advocacy); safety and security (pedestrian safety, phone and computer/email scam recognition; and new technology (how to use electronic banking and things like Zelle or PayPal).

Some participants acknowledge they don’t want to be actively engaged in the activity at hand but want the opportunity to sit on the periphery and engage through observation or quiet activities such as Chess, Mahjong, Scrabble, A Date with History (one does not have to talk to the opponent or presenter). As one person disclosed, ***“I like Senior Center activities where I can be in the group and be present with others, but don’t have to engage.”*** They talked about wanting a place where they could come to be with others. Socialization and engagement does not require physical and verbal interaction, as noted by one participant, ***“You can interact through the game and don’t have to talk if you don’t want to.”***

Fellowship over meals came up in every group as an opportunity to socialize with old and new friends – sit down meals, a lunch bunch, or the grab and go lunches. The meals are socially, nutritionally, physically and psychosocially nourishing. One participant notes that the staff at the Senior Center ***“...says Hello, asks if we need anything, gives personal attention.”*** Several participants also commented on Elizabeth’s time to interact with those whom are quieter and sit “on the periphery”, as well as take the time to assess the overall wellbeing of individuals and intervene, as needed, in a timely manner.

The participants generally agreed that the older adult exercise classes inclusive of range of motion and movements that consider individual differences in abilities and function are critical to safety and well-being. Their statements emphasized that the age of the instructor was not of import. They explained the need for the instructors to be knowledgeable of older adults' functional abilities, range, and individual variances, in order to discern and make the appropriate and safe adaptations and accommodations to individual needs. One participant exclaimed, ***"I don't want to take Zumba with a room of 20 somethings. I need instructors and peers who understand how an older body works."***

It became apparent the participants had a strong desire and need for higher levels of safety and education of the Shorewood Fitness Center resources, as well as hands on training of Shorewood Fitness Center equipment and machinery. Some groups identified access to fitness equipment and/or more age specific educational support on proper and safe use of the exercise equipment at the Shorewood Fitness Center which became a topic of conversation. As one person shared, ***"A trainer is cost prohibitive. I didn't know how to use the machine and I fell off. No one came to help me as I laid on the floor...."*** One caregiver new to the area wanted more access to the pool and information about times available with a fervent wish for ***"a swim class we [caregiver and both parents who need care] could all do together."*** Although there is a lift, several people wanted it operated by someone who better understands older adults.

Fall prevention classes were identified as a significantly valuable and sustainable need. Fear of falling is a common experience among older adults, that paradoxically can lead to falls. Therefore, fall prevention education becomes essential to reduce morbidity and mortality. ***"I'm more and more afraid to fall, I'd like to take this class more often."*** Several people said, ***"I learn something new every time I take it."***

The initial motivation and reasons identified for action to engage in a group class or classes was unique to each person. As one person clarified, ***"I was a caretaker most of my life. Sometimes you get to a point where you realize, I have to do something for myself."*** Two statements by people who do not currently use the SRC services captured the common reasons why services may not be used. ***"So far I have not felt the need for the programs. Fortunately, we are doing well with current supports."*** The other stated, ***"I'm quite busy and I forget that SRC services are available."***

Programs priorities are designed to represent the needs of the community groups based upon needs, interests, age and resources. This was adeptly expressed in the sentiment, ***"When you're younger you can participate, but it's for fun. As you get older, participation is not a want, it's a need."*** For some older adults, programs were a "lifesaver", especially after traumatic events and losses. The emotional and physical losses and need to find engagement was explained by one participant, ***"When my husband died, I had never lived alone, and I didn't know if I could do it. The first thing I did was join book club and that has seen me through a lot of things."***

Participants highlighted their observations of people's joy, engagement and extension of the time they participate and developed new social relationships and groups i.e.: the people come early and/or stay late. One participant exclaimed, ***"I see people leaving activities at the SRC and they just glow with engagement. You can see that their lives have been enriched."***

Through COVID, on-line programs kept people connected. Despite some early reluctance to learning the new technology, they adapted and continue to use in the present. This is particularly the case when unable to attend a class for physical or transportation reasons. On-line strategies also became a part of communication and engagement with family and friends, learning technology tools. One person explained a family member taught her, ***“I was forced to use Zoom during Covid. I initially said, “you can’t teach an old dog new tricks” and I was resistant. But now, I love Zoom. What a great resource. It’s nice to have the option.”***

Many people noted the programs helped them to form connections within the community that lasted beyond the program itself. As one person explained, ***“It was nice to go to classes and it was an opportunity to meet others in the neighborhood and make connections. Later you might see them in the grocery store and now you can say, ‘Hi.’”***

Connecting with age related peers is a strikingly unique experience, as one participant stated, ***“Shorewood is a young community, the diversity is great but it’s also nice to connect with people my age.”*** The connection may be way beyond simply acquaintances with each group providing examples such as the following. ***“During chess we share our stories. It makes us feel like we’re not lost, our lives matter to others.”*** As stated above, for others it may be simply sharing the space with others without the need or desire to engage in conversation.

Several people expressed a desire and recommendation to have programs offered at times accessible for those that work, such as in early evenings and weekends. Expansion of these times would also serve to bridge the barrier to “senior” services. Offering lecture series and programs of special interest to people 50-65 years old serve to foster intergenerational relationships and support systems, as well as increased awareness of the aging process and services/resources available in the community for present and future needs. This was clearly explained by one participant’s statements, ***“I realize the programming could be attractive to me but I haven’t gotten used to thinking of myself as a senior yet.” “I don’t feel like I need it, I have strong social networks at this time, if those start to change or break down, I will.”*** Several people were not aware of the scope of services and programs available. The Senior Resource Center serves as a pipeline to community awareness, intervention, volunteerism and engagement in the broader community.

Finally, intergenerational activities, volunteerism and working/interacting with children were important to participants and an influential component of aging in community. Participants express a strong desire for more volunteer opportunities which included working with schools (Monarch Project, reading, ELL pen-pals), volunteer and engagement within the community and/or a food pantry, among other suggestions and recommendations. These and other activities would provide/enhance a sense of purpose and an opportunity to share their time, talents, and knowledge. One participant stated it succinctly, ***“It’s not about age, it’s about community.”***

The aforementioned sentiment was expressed repeatedly across participants and groups, as one participant stated, ***“I would love to see programs that are more intergenerational, not only seniors.”*** Participants offered a multitude of suggestions for strategies to promote intergenerational activities across the lifespan, these were based upon a “need to know” subject matter and those of “interest”. For example, local celebrations, a “life stories” series where people of Shorewood share their story, continuing the decades dinners, as well as many

others. One participant pointed out that ***“The Summer Celebration is such a great intergenerational activity.”***

In addition, a conversation evolved with strategies to make intergenerational large gatherings age friendly for older adults to “find others” and have a place to gather. For example, at the fireworks have a bench or table reserved for older adults to share the experience, rather than be alone or not to attend. Another suggestion involved a similar strategy at the farmer’s market, or the beer garden.

A common theme from participants is the lack of access to information, which created lack of information, disengagement from the community and many “missed opportunities”. The participants identified several of the barriers to information access, as one person explained, ***“It’s good that the SRC provides info on paper. Not having a computer or a smart phone is a barrier to many things, but not to participation here [SRC].”*** Another suggestion was, ***“to have an informational flyer posted at common and frequented locations within the community and business district.”***

Collaboration among departments and service program organizations was a frequent request succinctly articulated by one participant, ***“It would be helpful if there was more collaboration between the SRC and the library, health department, historical society. It would be nice to have one page/place to see what’s available at all of them.”*** A myriad of collaborative teamwork groups were identified, for example: Recreation Department, Health Department, Library, Osher Lifelong Learning Institute, North Shore School for Seniors, East Side Senior Services, Aging and Disability Resource Center, Riverwest Elders Group, Churches, Temples, Spiritual Organizations, Pharmacies (recognized by many participants as valuable resource for health information) and Shorewood Women and Men’s Clubs to name a few viable options.

Marketing

Throughout the data and focus groups, it became quite apparent, the great need for dissemination of information regarding the breadth of services provided by the Senior Resource Center and Shorewood Connects. This illuminates the needs for a concerted effort toward different marketing strategies to be integrated into the programming initiatives. Some of these marketing strategies were posed previously (open house, consolidate activities, etc.). Other key strategies include establishing a marketing committee, brochures and /or pamphlets, welcome to Shorewood postcard with websites, collaboration with local businesses, churches, and organizations.

The vast majority of participants identified their lack of awareness of the many resources available within the SRC and the community, for example Shorewood Care Network and Buy Nothing Shorewood. A request repeated in most groups was to consolidate the activities of various groups (SRC, Rec Center, Health Dept, Historical Society) into one list that may be posted around the community. Several people suggested ***“...have an Open House to let people know about the community offerings.”*** Another participant suggested to dedicate the wall next to the stairs down to the Village Center as a “go to” place to see the activities an older adult might want to be engaged. Those that don’t yet see themselves are participating in a

“senior” activity may be attracted to programs/service offerings that pique their interest and engagement.

DISCUSSION and SUMMARY

The Elder Services Advisory Board gathered data from the community that has implications for older adult quality of life and safety by decreasing social isolation through enhancing services and programs. The survey responders and focus group participants wanted relationships with peers and referrals by knowledgeable trustworthy people. The focus group participants revealed fears of moving forward in a community where older adults are not perceived as valued and will potentially lack the necessary resources and supports.

Older adults expressed desire and need for more programming for fun and education, with both intergenerational activities and opportunities to socialize with peers. The number one priority by older adults was a place to gather socially with other older adults, at various levels through a variety programs and services. Favorite programming were tech assistance, toenail clinic, fall prevention, boost your brain, and exercise geared toward the mobility and health of older adults.

Strong transformational leadership and advocacy are critical to ensure sufficient and sustainable resources for older adults to promote and maintain successful aging which includes overall health, wellbeing and quality of life throughout the aging process and trajectory. This is also important for the health and wellbeing of the community and community resources. It takes a village to enrich and sustain the life of the community, the Village of Shorewood. A sustainable Senior Resource Center has potential to enhance an older adult’s life and their contribution to the community.

The data brought attention to needs of older adults in Shorewood that require more attention and positive actions by ESAB, the Village Manager and Trustees. ***“Let’s make sure that those who are young in the community know that resources will be here as they age in the community.”*** The following section addresses the ESAB recommendation developed from the data and literature previously discussed.

***“This Senior Resource Center is a very important thing for us.
And there are more of us all the time.”***

Elder Services Advisory Board Recommendations for Sustainability of Shorewood Senior Services 2024

Communities play a crucial and consequential role in the life of each of its older adult citizens through its purposeful actions and services. The qualitative and quantitative evidence from the surveys and focus groups, as well as Consultant Sue Kelley's June 2023 report to ESAB (Appendix C) and her Meetings with Stakeholders Report January 2024 (Appendix D), serves as the foundation for ESAB's recommendations for the current health of older adults and the sustainability of the Senior Resource Center (SRC).

GOAL 1: INCREASE SOCIALIZATION AND OVERALL WELLBEING FOR OLDER ADULTS

The data strongly indicates the need for an accessible welcoming space for older adults' engagement. A place to gather with peers to share stories and laughter, to share knowledge and information, to be creative and problem solve.

“Senior Resource Center is one of the reasons we moved here. If you want to draw people here, keep people here, have this unique feature of the SRC.”

Recommendations:

- **Create a Benjamin Center in the Village Center** of adequate size and with a welcoming milieu to increase socialization and wellbeing of older adults. The space would be used for informal socializing, smaller programs and other gatherings serving older adults and intergenerational activities. Utilizing the Benjamin Fund and other potential funding sources for necessary renovations.
 - Option One: Renovate the combined current SRC office and Spector Conference room into one large room for the Benjamin Center Lounge.
 - Option Two: Renovate the waiting area of the current North Shore Health Department (NSHD) space in the lower level of the library.
- Create **combined collaborative staff office space in the former North Shore Health Department** Space (NSHD) consisting of Recreation Department staff and the Benjamin Center Director (former title SRC Director of Senior Services) and Program Assistant. The shared space would create synergy and collaborative initiatives across departments and advocacy for older adults throughout the village.
 - Provide private office space for staff to engage in uninterrupted private conversations and to focus on critical administrative tasks.
 - Use NSHD Clinic space for community blood pressure checks, flu clinics and the toe-nail clinics. It would provide easy access for older adults in a familiar place.
 - The NSHD conference room would be reservable for public and private meetings.

GOAL 2: CONSISTENT ACCESS TO CREDIBLE RESOURCES VIA INFORMATION AND REFERRALS

The data consistently revealed the Senior Resource Center Director provides current information and anticipatory guidance to be acted upon, to address the services available that promotes the wellbeing of older adults and their care partners. Trust and respect are developed, enhanced, and maintained by follow up calls and regular interactions through SRC activities that foster and strengthen relationships.

Recommendations:

- **Maintain a 0.9 FTE village position for a Director of the Benjamin Center.** A job description will be created in the implementation plan and the position would report to the Village Manager. Private office space would be provided to meet with older adults, caregivers, families and other persons or staff.
 - The Director would **collaborate and work with the new Case Manager (NSHD)** position regarding short- and long-term plans for older adults.
 - In addition to information and referral services, the Director would be responsible for administration, budget, transition/implementation plans, contracts, Benjamin Center volunteers, Age-Friendly plan administration, DAWG, and ESAB liaison.
 - **Older Adult Information and Referral Specialist, certified by Informed Wisconsin.** Having a Library staff member trained would reduce the reliance on one individual, encourage multiple access points for information, and create aging services that are in alignment with the Youth Specialist position.
<https://www.wisconsinairs.org/membership/certification-accreditation/>
 - Include a curated area in the library for older adults and their caregivers.
- **Develop collaborative relationships across service providers and Shorewood residents.** Invite and encourage staff of East Side Senior Services (ESS), the newly created North Shore Case Manager, and the Milwaukee Aging Disability Resource Center (ADRC) to attend activities.
 - Community service providers become actively engaged with and become familiar with Shorewood residents.
 - Enhance the Shorewood residents' opportunities to learn about the services available and develop relationships with multiple community providers.

GOAL 3: INCREASE PROGRAMMING AND STRENGTHEN INTERGENERATIONAL CONNECTIONS

The older adults had a plethora of thoughtful ideas for increasing the programs offered by the Senior Resource Center, including early evenings and weekend hours for those still working. Collaborative efforts across groups allow for additional space and expanded program hours. It is

critical that the groups are sensitive to the aging process changes and address the needs and interests of older adults.

“So many people feel isolated from the community as they age.

The Senior Resource Center can play a role in connecting Seniors to younger people and the community. Remind both us and them, we’re still here, we belong here.”

Recommendations:

- **Benjamin Center Director maintains social programming** (ex: box lunches, pop up gatherings), **and information and referral programming** (ex: Medicare, Social Security, preparing documents).
- **Transition senior programming to the Recreation Department.**
 - Strengthen intergenerational connections within the Benjamin Center, Recreation Department, Library, and greater community via collaboration with Benjamin Center staff and volunteers. Develop sensitivity to the aging process changes and address effective and safe programming opportunities for older adults.
 - Parks and Open Spaces (PPS) are responsible for advocating pedestrian safety via Bike Rodeo and the Walk Audits. The Recreation Department would continue pedestrian advocacy via First Ride and Bike Rodeo and participate with PPS Walk Audits.
 - Recreation staff responsible for recruiting community volunteers for Yard Clean Up day.
- **Continue and increase community collaborations** with Historical Society, Library, School District, Health Department, Community Clubs, OSHER Lifelong Learning, Riverwest Elders and local businesses and pharmacies.

GOAL 4: MAINTAIN SHOREWOOD’S DESIGNATION AS AGE FRIENDLY AND DEMENTIA FRIENDLY COMMUNITY

In 2007, WHO initiated the Age-Friendly Cities encouraging the implementation of policies and programs to enhance communities, increase older adults’ healthy life spans and enhance quality of life. In 2014, Generations United recognized Shorewood as one of the best intergenerational communities in the nation. In 2017, AARP distinguished Shorewood as an Age Friendly Community, the first in Wisconsin. The Village Board approved an Age Friendly plan in 2019. In 2020, additional recognition was awarded from Dementia Friendly America as a Dementia Friendly Community. In 2023, Shorewood was recognized by AARP for completion of five years as an Age-Friendly community. A senior friendly community helps attract residents, which in turn helps with stability of home and rental occupancy.

Recommendations:

- **Eliminate the Shorewood Connects contracted position when it ends** 12/31/2025 and distribute those responsibilities among the various relevant positions and groups noted below.
 - Benjamin Center Director administers Age-Friendly Plan (including reporting to AARP and supporting the various people with responsibilities to meet goals and deadlines), coordinates older adult households for fall yard cleanup along with Eastside Senior Services, administers Dementia Awareness Workgroup (DAWG).
 - ESAB responsible for Age Friendly initiatives such as the Decades Dinners, and Pedestrian Advocacy (liaison to Parks and Public Spaces).
 - Recreation Department responsible for recruiting fall yard cleanup volunteers, pedestrian safety advocacy, intergenerational connections and programming (ie. Welcome New Neighbors, recreation classes).
 - Dementia Awareness Workgroup responsible for Memory Café, Coffee and Conversations Caregiver Support Group, and community education sessions

GOAL 5: VILLAGE GOVERNANCE INCLUDES ENHANCED AWARENESS AND RECOGNITION OF OLDER ADULTS' NEEDS AND CONTRIBUTIONS

AARP and other communities have identified Shorewood as a leader and role model for other communities throughout Wisconsin and nationally. Shorewood has gained a reputation as a leader in the age friendly community working with and for older adults. Every Shorewood department and committee can take an active role in the integration of enhanced awareness and the promotion of age friendly perspective and initiatives.

Recommendations:

- **Policy changes designating permanent ESAB designee seats on boards** and committees to include age-friendly concerns throughout the village.
 - ESAB member or designee position on Library Board
 - ESAB member or designee position Recreation Advisory Committee
 - ESAB member or designee position on Planning Commission
- **Promote all village services/departments to propose initiatives for the Age Friendly Plan.** Individuals and departments such as Police, Department of Public Works, Village Trustees, etc. all have the opportunity to propose initiatives for the Age Friendly Plan, as well as to collaborate to implement said initiatives.

GOAL 6: INCREASE AWARENESS OF PROGRAMS AND SERVICES FOR OLDER ADULTS

Recommendation:

- Bring together North Shore groups and service providers working with older adults toward the goal of **more access to and visibility of village services, programs, and resources.** Include the Benjamin Center, Recreation Department,

Library, and Health Department Case Manager to develop overlapping or integrated marketing opportunities, strategies, and/or materials.

GOAL 7: PROVIDE FISCALLY RESPONSIBLE SERVICES MINDFUL OF SHOREWOOD TAXPAYERS

Recommendation:

- **Build stronger relationships, synergy, and collaboration, among departments** for integrated older adult and intergenerational programming. These departments include Shorewood Recreation Department, Shorewood Library, North Shore Health Department Case Manager, and Benjamin Center Director among others.
- Eliminate .5 FTE SRC Program Assistant Position when current programming is transitioned to Recreation Department (saving approximately \$18,000).
- Eliminate Shorewood Connects Contract Position when the contract ends (saving \$6385) and disperse responsibilities as noted above.
- Benjamin Center Director will function as the authorized administrator of the Benjamin Fund with oversight by ESAB, the Village Manager and Shorewood Foundation.

Implementation Plan – Initial Actions

- Determine who will be responsible for the various recommendations in terms of project management and implementation plans. What is needed to set everyone up for success in the short term and long term? Rebecca Ewald agreed to help with creating the plan.
- Village Manager and School District develop agreement for recreation staff and Benjamin Center staff shared space in the Village Center.
 - A clear understanding of the rules and expectations for the use of space is important to be included.
- Elizabeth Price and Jody Brooks create a transition plan for senior programming.
 - Develop policies and procedures to meet needs for programming, scheduling space, allocation of Benjamin funds and registration fees, etc. as necessary.
 - A written clear understanding of the rules and expectations for the use of space is essential.
- Plan for a transfer of Shorewood Connects role to others.
 - Jody Brooks/Recreation Department assign recreation staff member to shadow/assist with 2024 Yard Clean Up, lead with support in 2025, and be fully responsible for the Yard Clean Up in 2026 and in the future. Benjamin Center Director will collaborate with ESS Director in serving seniors with Yard Clean-Up.
 - ESAB member assist with Decades Dinner and hosting Welcome New Neighbors in 2024 and 2025.

- It is key to define roles of ESAB and the job description of the Benjamin Center Director, including the tasks and whom the Director position reports. As ESAB members change it is important that the work doesn't end up as one more task being done by the Director of the Benjamin Center.
- Elizabeth Price and an ESAB member will work with an architect or designer to explore options for renovations within the lower level of the Library/Village Center to create a Benjamin Center lounge. This step would be paid by the Benjamin fund. Additional funding sources with grants and private donations will be explored. Create a request for proposals (RFP) for architectural support and talk to Shorewood Foundation about funds. Develop a temporary timeline for changes. It is important to hear from people using the space what their needs are and ideas for how they use the space to understand and prioritize the different views and needs.
- Ordinance changes are made by Village Manager to allow for ESAB or designee representation on the Recreation Advisory Board, the Library Board, and Planning Commission.
 - [Recreation & Community Services Advisory Committee](#)
 - [350-3 Library Board](#)
 - Applications by ESAB designees were filed in January 2024 for the Library Board and Recreation Advisory Committee.

***“What we do helps everyone, not just seniors.
It will show the value of Shorewood Resource Center to the Village.”***

ESAB Subcommittee on Sustainability of Senior Resource Center:

Sue Bronson, LCSW, Mediator-Advanced Practitioner, ESAB Chair

Katie Gnau, MAT, Realtor

Dr. Rosina Bloomingdale, DNP, APRN, AGSNS-BC, GCNS, APNP

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Appendix A

Manager's Memo

Elder Services Advisory Board Seeks Residents to Participate in Survey and Focus Groups

The Elder Services Advisory Board (ESAB) invites Village of Shorewood residents age 50 and older as well as residents who care for older adults to take part in an online survey and/or in person focus groups.

The Elder Services Advisory Board hopes to gain insight into community member views, experiences, insights and suggestions. Information gained will help to guide the Senior Resource Center in its mission to serve older adults within our community.



The online survey can be found at this link: <https://forms.gle/aPfe4oKaFx14UgLu9>.

In-person focus groups will take place October 12, 13 and 14. A variety of time slots are available. If you would be willing to take part in the focus group, please indicate your interest via email at src@shorewoodwi.gov.

Focus Group Email Invitation

Good Afternoon Shorewood Community Members,

You have been selected at the recommendation of _____ to be invited to participate in a focus group discussion conducted by the Shorewood Elder Services Advisory Board (ESAB) members. ESAB advises the Shorewood Village Board on older adult needs in our community. Programs and services provided through the Senior Resource Center (SRC) reflect ESAB's understanding of these needs. We are guided by the belief that an age-friendly community benefits all community members, supporting lifelong community engagement.

To gain an enhanced understanding of the community needs, ESAB is inviting residents age 50 and older, and caregivers of any age, to take part in a small focus group. The focus group discussion will consist of approximately 8 persons per group and last approximately one and a half hours.

The purpose of these focus group discussions is to help identify the needs of the older adult and their family members within the community. This information will be used to direct services provided by the SRC. Your views, experiences, insights, and suggestions as Shorewood community members are important to shape the development and sustainability of the SRC in its mission to serve older adults within our community.

The information obtained from the focus groups will not be personally identifiable.

The focus groups are scheduled to take place in mid-October. A variety of time slots are being offered to make it convenient to fit your personal schedule.

We are excited to invite you to join the discussion.

If you would like to take part in a focus group, please respond with your availability from the list below to the ESAB staff liaison at: src@shorewoodwi.gov.

Thursday, Oct. 12

11:30 am - 1 pm **or** 6 - 7:30 pm

Friday, October 13

10:30 am - 12 pm **or** 4 - 5:30 pm

Saturday, Oct. 14

10:30 am - 12 pm **or** 1 - 2:30 pm

More information will be sent to you confirming your attendance.

Thank you for your time and willingness to consider this request.

Sincerely,

Elder Services Advisory Board
Village of Shorewood
src@shorewoodwi.gov

Appendix B

SRC 2023 Community Input Survey Results

October 16th, 2023 Compiled by Vashti Lozier

1. n=73 respondents (all but one is a current Shorewood resident) 2. Age 87.7% of respondents are age 60+

Age Range	Percent
< 50	2.7%
50-54	4.1%
55-59	5.5%
60-64	6.8%
65-69	13.7%
70-74	23.3%
75-79	30.1%
80-84	11%
85-89	1.4%
90-94	0
>94	1.4%

3. Do you provide support or care to anyone 60 or older? 26.1% of respondents are caregivers

Response	Percent
Yes, to a parent or family member	13.7%
Yes, to a spouse/partner	11%
Yes, to a friend and neighbor	1.4%
Yes, I am a paid caregiver	0
No, but I have been a caregiver in the past	17.8%
No	56.2%

4a. The SRC provides 1-on-1 resource referrals to older residents and their family members to creditable services and supports. What types of information/referral do you think is helpful or important for yourself or as a caregiver? (check all that apply)

Referral Services	# who think it's important (% out of 70)
Transportation/rides	44 (62.9%)
Finding in-home assistance and/or learning about home modification	42 (60%)
Medicare and insurance options	37 (52.9%)
Respite care and other help for caregivers	28 (40%)
Resources for mental health	28 (40%)
Dementia programming, services, resources	25 (35.7%)
Home meal delivery	25 (35.7%)
Prescription drug programs	24 (34.3%)
Elder abuse reporting	11 (15.7%)

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Other:

- Affordable housing
- Exercise for those with limitations
- Safety
- I'd rate things concerning affordability highest
- Resources for vision, hearing, dental
- Help finding assistance with reputable services (paid) to enable elderly residents to stay in their homes, such as snow shoveling, leaf raking, cleaning, etc.
- Long term care planning and funding
- Home repair, personal shoppers

4b. How important are SRC information and referral services for the Shorewood community? (1 not important, 5 very important)

$\bar{x} = 4.48$

5a. The SRC offers classes, programming, and services for older adults age 60+. Which of the following would you be interested in either for yourself or for someone you care for? (check all that apply)

Classes/Programming	# who think it's important (% out of 71)
Clinical services including vaccine clinics, toe nail care, and memory screenings	51 (71.8%)
Exercise, yoga, zumba, tai chi or other health/fitness classes	48 (67.6%)
Health and Wellness classes including nutrition, fall prevention, brain health, etc.	45 (63.4%)
Technology assistance, i.e., phone, computer, email, etc.	45 (63.4%)
Luncheons with time to socialize	25 (35.2%)
Fun gatherings including games, bingo, or discussion groups	23 (32.4%)

Other:

- Group travel to museums, shops, events, plays, music
- Paperwork planning for survivors at time of death
- SRC activities are ESSENTIAL for Shorewood older residents!
- Cultural programs like lectures, art, music
- Bus tours

5b. How important is this kind of programming for the Shorewood community? (1 not important, 5 very important)

$\bar{x} = 4.58$

6a. Shorewood Connects coordinates a variety of programming and advocacy work. Which of the following do you feel are important for Shorewood (check all that apply)?

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Program	# who think it's important (% out of 71)
Fall Yard Cleanup (annual event) - volunteers are paired with older and disabled residents for a morning of light yard work	61 (85.9%)
Walking, Biking, and public transit safety and accessibility advocacy	60 (84.5%)
Memory Cafe - a monthly social group for people with memory loss and their caregivers	51 (71.8%)
Coffee & Conversation - a monthly support group for caregivers of people with memory loss	44 (62%)
Educational programming to provide information and support around brain health and memory loss	44 (62%)
Walk Audits - volunteer teams which survey our Village streets, sidewalks, and intersections for safety and accessibility	35 (49.3%)
Welcome New Neighbors - Online information and an annual welcome picnic for new Shorewood residents	35 (49.3%)
Decades Dinner - 8 residents, each representing a different life decade, dine together and participate in facilitated conversation	30 (42.3%)

6b. Shorewood Connects brings together residents, the School District, Village, businesses, and organizations to develop intergenerational connections and provide programming and advocacy (like above) that will lead to an age-friendly community. How important do you think this program is for the Shorewood community? (1 not important, 5 very important)

$\bar{x} = 4.31$

7. If you have used the SRC or participated in Shorewood Connects programming, which ones and what feedback do you have on those experiences?

- New to Shorewood...first class this week
- Assistance with rides for health care and tech services for phone and ipad greatly appreciated and lunch program on Wednesday. History lectures and political candidates are very helpful.
- Musical programs are needed and provide a fun experience.
- Coffee and Conversation and Memory Cafe
- Decades Dinner was lovely to participate in but I think someone else would have benefited more from the experience than me but I hope my input was useful
- Director is unkind, stubborn, not welcoming to the point of rejecting people with special needs who could easily be accommodated at these events
- Excellent memory class just now underway; have used toe nail trimmers here for years, as did my husband; even the visit, itself, has its benefits beyond foot care
- Excellent services. Participate when I can.
- Exercise class helped with balance
- Fall and Spring Yard Cleanup has been of great value to me. Volunteers are friendly and efficient. Response from SRC for any issues has been prompt and effective: leaf bags were overfilled and not picked up by DPW. Volunteer stopped back and fixed the problem.
- Fall clinic very helpful
- Fall Yard Clean-Up & Annual Welcome New Neighbors Gathering - Both events were a great opportunity to engage with other Shorewood residents.
- The SRC is a wealth of information!
- Help in finding low cost health screening services.
- Toenail care- excellent service not available elsewhere; Christmas program; Tech help; Online history lecture
- I have not used
- I have referred people there for help. Always successful.

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- Video sessions about food...I felt unwelcome. My camera was off for better connectivity and I was told that I wasn't welcome if my camera was off.
- No, but I'm thinking ahead for myself and my husband.
- Excellent services; participate when I can.
- Field trips and historical walks. All good.
- No need
- Need presenters that keep activity moving so attendees don't use it as depressing talk about health, etc.
- I went on a bus tour of Milwaukee. Very interesting.

- Nail service and Yard Cleanup have helped
- Have not used any as of this time
- Health and wellness workshops
- Not yet
- Info on Medicare
- I have participated in almost all of the SRC events/classes. They are very necessary to my socialization and help me keep connected to my friends and neighbors.
- I feel it would be nicer to see a luncheon with high school and older adults meeting.
- We need to stop the grab-and-go lunches and get back to monthly eat-in lunches and socializing
- Memory Cafe
- Used services in the past for the person I cared for; very positive & welcoming experience.
- Assistance with rides for health care and tech services for phone and ipad greatly appreciated and lunch program on Wednesday. History lectures and political candidates are very helpful. Musical programs are needed and provide a fun experience.

8. If you have NOT used the services of the SRC, why not?

- I still live an independent and active life so fortunately have not needed most of the SRC's resources.
- Unaware of the services
- Mobility issues and/or schedule conflicts
- So far I have not felt the need for the programs. Fortunately we are doing well with current supports.
- No information, time conflict
- Not pertinent to me yet
- Was focused on work until this year
- Haven't needed it yet
- Unaware of services
- Don't really need any help
- I felt unwelcome when I tried my first event.
- Recently moved here.
- I am still working but may retire next year
- Still totally independent
- I either didn't find it interesting, useful, or at a time that was convenient for me
- Other commitments
- Haven't had the need as yet but may need in the future
- Lack of awareness and timing
- Busy with family
- Planning. Getting events on the calendar. Other obligations.
- Too much effort to get there. I use a walker and don't have help to lift in and out of a car. Bus not useful. Doors are hard to manage unless automated.
- Not needed at this time

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- Being 65 years old now makes this all more relevant for me. I am grateful to live in a community where these resources/services are available
- I'm quite busy and I forget that SRC services are available.
- My wife and I are athletes and are very active. However, we are in our 70s and may need to use services in the future.

- Timing
- I don't know enough about it
- New to Shorewood
- My life is busy
- I'm not quite old enough yet and my parents haven't moved here yet, but they plan to within 5 years
- Not lately. See last response about SRC director. Can't deal with her.
- No need at this time
- Still working part-time but could see using them in the future
- So far, I've not been interested in SRC programming. I have no sense of how important the SRC is to Shorewood even though I've known about it for 20+ years and receive their emails monthly. Much of the information and services SRC offers I already get from other local sources.
- There is already too much "on my plate"
- Still working FT and most/all events are during daytime hours
- I haven't felt the need (yet)
- Not needed at this moment
- Keep meaning to...
- Busy with the grandchildren and families
- No perceived need
- Not aware

9. What additional programs (classes, workshops, etc.), services, or resources would you like to see for older adults or caregivers in Shorewood?

- Annual tax services. Intervention with cable services to make them affordable. Offer classes at "The Oaks of Shorewood", a senior community
- Book club
- A list of how to get the services and what they are if not needed now. Information on how to stay in your home.
- Lists of vetted handymen, plumbers, electricians, etc. for seniors. Services that help seniors stay in their homes.
- Not estate planning, but basic "paperwork" planning for survivors at time of death. What is most important for them to have quick access to?
- At the moment, I am trying to find the beautician's name who did the nail clinic. I am also trying to get my husband to check out the fitness center for the winter as he graduated from his cardiac rehab after open heart surgery in April. Future - bathroom renovations to reduce falls.
- Avoiding scammers! (Phone, email, Facebook ads, etc. I could probably teach it, haha)
- "Getting ready to retire" workshop
- Increase police presence, reduce speed on Capitol Drive, go after reckless drivers
- Reliable and economical snow removal, lawn care, handyman resources to help the elderly remain in their Shorewood homes.
- Supporting families with an older adult member who has challenging behaviors.
- More arts and crafts
- I'd like to see more day trips
- The monthly luncheons are missed
- Retirement preparation

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- Art classes
 - Educational programs at the senior center
 - None
-
- An option for virtual attendance to meet the needs of older adults who are not mobile
 - Tech - Computers, mobile apps
 - More in-person activities especially lunches as we did before COVID
 - Other seniors with greater immediate need could weigh in better. I'd suggest something inter-generational for those who might not have family or family close by - especially during the holidays or change of seasons but I'm only guessing here
 - Any programs on health care in the home, cleaning services and wellness programs
 - Access to swimming, water classes
 - Outdoor activity groups, i.e, hiking, walking tours
 - Estate planning. Medicare and insurances, any money-saving resources
 - Possibly some late afternoon or evening or weekend programs. I belong to UWM Osher so my days are busy. Programs later in the day would offer me an opportunity for socialization closer to home when it is dark or the weather is bad for driving.
 - Help with resources for staying in my home
 - Meetups based on areas of interest. Could be open to seniors beyond Shorewood. Socializing with senior members of different ethnic groups. Senior singles group - can also be open to those beyond Shorewood
 - There is quite a variety now

10. If you live in Shorewood, please share briefly with us why you chose this community.

- Walkable
- My parents chose Shorewood for the schools. I came back after college to care for them. Now my sister and I own our family home of 55 years.
- I owned a house here for 30 years.
- Walkability, access to the lake, multigenerational community, village services
- Diversity, school system quality, close to events
- I have never wanted to live anywhere else. These resources/services are invaluable.
- Chose it 23 years ago for walkability. Also schools for my co-owner of our duplex.
- I lived here since 1971 and it has been a wonderful community in which to raise children. The community values align with my own. The modest housing is in a safe neighborhood and the walkable, bikeable, lifestyle is crucial.
- Proximity to UWM, downtown, the lake, Atwater, Hubbard Park, the river, and more diverse than going further north. It also has a lot of great people and has a community feel. The group FB pages - "Buy Nothing Shorewood" and "Shorewood Community Network" are gems.
- We have lived here since 1971 through the whole cycle of adult life.
- Proximity to downtown, walkability, great schools and property values. We sent our kids to Catholic schools but we still value the school system in Shorewood.
- Great sense of community
- Love the "small town" feel of the village and how everyone stays connected
- Family lives here
- It's a friendly, progressive place of the right size where you can get to know your neighbors. Also good schools.
- Born here, moved away, moved back
- Grew up in Milwaukee and its suburbs (Wauwatosa, Brookfield) and have lived in Shorewood 50+ years
- Neighborhood feel, walkable, good school system, great parks, politically progressive
- Diversity, walking

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- Intergenerational, varied social economic groups, walkable with bus availability, close to UWM
- I have lived here since 1968. I love this community!
- Safe and walkable

- Good schools, near the lake, small community
- Safety, walkability, resources
- I chose Shorewood 42 years ago because of the good schools and safe environment
- Moved here 22 years ago for the charm, closeness to downtown
- Schools and safety
- Walkable, love the lake and the river, diverse housing and kind residents
- Friends live here, safe, like diversity and community feel
- Schools; close to work
- School system
- Schools
- We found exactly the kind of home, in our budget, we had been looking for.
- Home stock, walkable community
- Proximity to the lake and green spaces, diversity, walkability, quality restaurants, amazing library
- I was hired for a position at UWM. Shorewood was an excellent choice.
- Grew up here, close to work and family, safe, good mix of people, strong schools
- I grew up here. My parents chose the community because of the schools
- The community resources, the walkability, the neighborhoods, the parks, the people
- I've lived here for almost 50 years and my husband was born and raised here
- I moved here as an unmarried younger career woman, but stayed and bought a home when we had gotten married and had begun our family because we found so much to like about this compact community - educated and kind neighbors, a safe environment, a charming and affordable neighborhood, convenience in amenities; an environment we thought our family would thrive in; proximity to our work places/ downtown / Brewer's Hill; and the feeling that people simply cared.
- My daughters live here so I joined them
- Beautiful neighborhoods; business district within walking distance; good schools; close to downtown Milwaukee; public transportation available. Walkable.
- The schools and being liberal
- Walkability, near the lake, and rental housing choices
- Safe, secure, quite, walkable shops, pleasant community
- Moved here over 40 years ago and still in same home. Village strives to be welcoming to all and in my past experiences, has been open to community input re resident concerns and suggestions re services. Now that many of us residing here, whether recently or long-term, are "older" we risk isolation and invisibility. We are often out midday when others, including family, are working or in school, raising young children, or often living far away. The services of the Shorewood Senior Resource Center are crucial.
- Walkable. Excellent public schools. The library.
- Easily accessible for walkers. Not ultra conservative. Close to university opportunities.
- We moved into the Shorewood community in April of 2002. We looked at houses all around the Milwaukee area. We landed in Shorewood because we suddenly realized that we should live in the community we always frequented. We were avid visitors to Shorewood for restaurants, retail stores, groceries, bookstore, parks, and visiting friends. We were also attracted to the walkability and good schools to raise our family.
- Community, walkability, however it is becoming very expensive. Seniors need more affordable options to live in Shorewood
- Great schools and community activities
- Safety and convenience

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- Safety (I was a single woman when I moved here 45 years ago), good schools, strong sense of community, fun community activities, citizens involved in local government, super library, completely walkable and bikeable, lots of mature trees.
- School quality; diversity; close to activities; neighborhood feel
- Convenient location to shop; walkable
- Family here; walkable; access to lake; excellent schools
- Quality schools
- Beautiful, close to downtown, good schools, I can walk to most things. Public transit (buses) available.
- In 1975 close to UWM; In 1990 good school system; In 2018, walkable, everything I need is in the village. After 48 years, too much work to move somewhere else! Have lived in 5 spots from Kensington to Newton.
- My wife worked at UWM and we appreciated all the community assets.
- Diversity, commitment to education, walkability
- It is walkable and easy to get to places I go often (grocery shopping, pharmacy, restaurants, stores, and boutiques for gifts)
- We moved here for the schools when my oldest was entering kindergarten

APPENDIX C
Brief Summary of Consultant’s report to ESAB
Sustaining the Shorewood Resource Center dated June 2023

Challenges	Needs	Options
Shortage of Space	<ul style="list-style-type: none"> • Private conversations • Additional programming • Sense of place 	Expand footprint of SRC in lower level of Village Center
Staffing	<ul style="list-style-type: none"> • Maintaining part time workers • Drop in conversations interrupt admin tasks • Community connections and awareness of SRC 	<p>Hire two part time (16 hr/wk) Program assistants to ensure an extra person is available if needed.</p> <p>Longer term contract with the Rec Dept and or Library to expand programming to evenings and weekends</p>
Program expansion	<ul style="list-style-type: none"> • Flexibility for days, evenings, and weekends • Increase intergenerational and peer specific options • Fitness, learning, socialization 	Pilot a collaboration with the Shorewood Rec Dept and/or Library to do additional senior programming
Referrals and Navigation	<ul style="list-style-type: none"> • Meet with residents and solve problems • Up to date knowledge to be credible and trustworthy • Visibility – Do people know SRC exists? 	Contract with Eastside Senior Services to provide assistance on-site at the SRC
Age-friendly and dementia friendly initiatives	<ul style="list-style-type: none"> • DAWG, Dementia education • Walk audits • Yard clean up • Decades dinner 	<p>Change the status of Facilitator position from Contractor to part time Village employee.</p> <p>Incorporate Age-friendly goals across departments and into Village Visioning documents.</p>

APPENDIX D

Shorewood Senior Resource Center Sustainability Plan Consultant's Meetings with Stakeholders - January 2024

The Shorewood Elder Services Advisory Board contracted with Consultant Sue Kelley to conduct individual meetings with key stakeholders to share the preliminary findings of the Elder Services Advisory Board (ESAB) Senior Resource Center Sustainability Plan Recommendations and to gain stakeholder input to share with ESAB for its final report.

Meetings were held with the following individuals in the month of January.

- Rebecca Ewald, Village Manager, Village of Shorewood (also attended by Sue Bronson, ESAB)
- Jody Brooks, Director, Shorewood Recreation & Community Services Department
- Becky Rowland, Public Health Officer, North Shore Health Department
- Melissa Meier, Executive Director, Eastside Senior Services

Email communication also took place with the Shorewood Public Library's Interim Director, Hayley Johnson. Given the Library Board's focus on hiring a Director and other staff, it was determined that a meeting should be held at a later date.

Summary of discussion points and action steps

Rebecca Ewald – Village of Shorewood

- The Strategic Initiatives Committee of the Village Board will be reviewing future use of the North Shore Health Department (NSHD) space. The earliest it would likely be considering this issue would be sometime in the second quarter.
- Rebecca is supportive of the idea of having the Shorewood Rec Department take over SRC programming.
- Given that the Village of Shorewood has two appointments to the Recreation Department Advisory Board, she suggested that ESAB recruit an interested designee for one of these spots and submit an application to the Village for consideration.
- She is supportive of the idea of having the Shorewood Public Library develop initiatives specific to seniors. She also noted the Library's main focus is currently on hiring and staffing and noted that no additional revenue is likely to come from the Village at this time.
- Given that Library Board appointments will likely be open in the future, she suggested that interested ESAB designees apply and consideration be given to seeking a permanent seat on the Board.
- Rebecca recommended connecting with NSHD to discuss its short and long term plans for case management to explore collaboration on behalf of Shorewood seniors.

Next Steps

1. Recruit representatives for the Recreation Department Advisory Board and the Library Board.
2. Explore the possibility of designating permanent ESAB designee seats on each Board. The Village has the authority to do this for its appointments to the Rec Advisory Board. The Library Board appointment would require a change in its by-laws.

Jody Brooks – Shorewood Recreation Department

- Jody is supportive of the idea of assuming responsibility for SRC programming.
- He is also supportive of having an ESAB designee as one of the Village of Shorewood's appointments to the Recreation Advisory Board. (The Recreation Advisory Board currently meets 4x/year; is comprised of 9 members).
- Lack of space during the day is currently a roadblock in offering programs. If the NSHD space becomes available, the Rec Dept would like offer more exercise classes for seniors (currently not feasible at the Shorewood Fitness Center).
- The Rec Department would be interested in doing intergenerational programming as well.
- Jody would welcome a transition period to learn more about the SRC and how it serves the community.

Next Steps

1. Elizabeth Price and Jody Brooks meet to discuss possible transition plans and to look at NSHD space.
2. Jody Brooks to develop a program plan and budget.
3. ESAB to monitor the Village Board's Strategic Initiatives Committee for timing and requirements of proposals for use of the NSHD space.

Becky Rowland – North Shore Health Department

- The Health Department just created a Case Manager position, funded by the North Shore Fire Department for two years and thereafter by the Health Department.
- The focus of services will be on people who are frequent emergency callers, those who have had multiple falls requiring an EMS response, people with hazardous living conditions, and those who have experienced a drug overdose.
- Becky anticipates that more than 50% of those served will be over the age of 60.
- Data is being gathered on outcomes.
- Becky suggests that results be used for possible development of another Case Manager position for the consolidated North Shore, specifically for seniors.

Next Steps

Monitor NSHD Case Manager pilot to consider for future replication/expansion.

Melissa Meier – Eastside Senior Services (ESS)

- Melissa collaborates with SRC Coordinator in identifying resources.
- ESS currently serves some Shorewood residents.
- ESS’s “Make a Difference Day” closely aligns with the Shorewood Connects Annual Yard Clean-Up and ESS could assume responsibility for identifying and working with older adult recipients.
- Melissa recommends that the Village continues to have a “go-to” staff person who is known by seniors in the community and can help them find needed resources.

Next Steps

Continue to collaborate with ESS to serve seniors and transition SRC Yard Clean-Up role.

Other Notes/Recommendations re: Age-Friendliness

- Noting that the draft plan calls for Shorewood’s Age-Friendly initiatives to be shared among the Benjamin Center Coordinator, the Shorewood Recreation Department, and the Shorewood Connects Dementia Awareness Group, Shorewood Connects Facilitator Vashti Lozier recommends that ESAB consider identifying the Benjamin Center Coordinator as the person responsible for keeping tabs on the work of these various entities along with reporting to AARP and helping to move the work forward.

Other Notes/Recommendations re: NSHD Space

- Regularly attend Strategic Initiatives Committee meetings, beginning at least in April.
- With the Shorewood Recreation Department, develop a concept paper for the NSHD space to include benefits to seniors and the community, current Village costs vs. future costs with expansion, stability of partners. Consider possible audiences for circulation. Enlist School District Leadership in discussing concept. Once the Committee issues a request for proposals (rfp), this paper can serve as the basis for proposal development.
- Question candidates for Village Board and the School Board re: their support for the concept.
- Attend Village Board meetings when this is an agenda item.