Acknowledgements

CITY OF MILPITAS
SENIOR NEEDS ASSESSMENT

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I. Executive Summary

The **City of Milpitas, California,** located in Santa Clara County, offers a variety of programs and services for older adults in the community. Growth in the aging population has precipitated an increased demand for senior housing and senior services and programs. In May of 2001, the City recognized the need for a comprehensive **Needs Assessment Study** focused on Senior Housing, Adult Day Care Services, Transportation, Senior Center Facilities and Programs for the Milpitas senior population. The City Council initiated the study, following the Senior Advisory Commission's report on the need for a new Senior Center.

The **Senior Needs Assessment** is an objective and comprehensive view toward the future needs of Milpitas older adults. The goal of the assessment is to provide a working, planning tool based on stakeholder participation that will provide the City with a basis for decision-making and determine the priorities for facility development and service delivery in the future.

The methodology utilized to ascertain the senior needs included research and review of existing needs surveys and the following community processes to solicit input on the needs and priorities.

- Stakeholder Focus Group
- Written Questionnaires from Focus Group members
- Community Workshop
- Interviews of Service Providers of Senior Services
- Interviews of City Council Members
- Benchmark Survey of Comparable Cities

The information gleaned from this process and research on aging demographics and trends formed the basis for the study and needs analysis to identify gaps in service and future program, operational and facility needs. This summary presents the highlights of the assessment and its conclusions. Detailed data and analysis is contained in the body of this report and the appendices to substantiate the findings.

When planning services and facilities for the future, adult centers, policy makers and community service professionals should think of the center as a "Main Entrance" to home, community and social supports that can help delay or prevent more costly and restrictive institutional care. The young-old[1] will resist programs and facilities that are age-segmented. Look for centers of the future to be called ***Lifetime Centers, Wellness Centers*** or ***Learning Centers*** - not senior center. It is vitally important that these centers maintain quality services for the diverse populations they serve.

In their book ***Successful Aging***, Rowe and Kahn cite three key components to successful aging.

- Low risk of disease and disease-related disability
- High mental and physical functioning
- Active engagement in life

Although all three components are important, a major increase in the quality of life for the older adults can be attributed squarely to

[1] Young-old or new-old is used in reference to the post World War II baby boomers born 1946-1964. This group began entering their 50's in 1996.

the third factor: active engagement in life. Many elderly feel lonely and isolated even if they are members of caring families, for few families are adept at integrating the elderly into daily family life. Social connectedness is a powerful predictor of good health and can delay or prevent injury and disability.[2] Here is where the City, churches and local based community organizations clearly have a role to play.

Demographic and Trends Highlights

The demographic analysis completed for this assessment served as the primary base of information used to evaluate and project current and future service needs of the age 55 and over population in the City of Milpitas. An effort was made to use specific data for the population aged 55 and over for all the analysis. However, there are instances when data was not available for that age segment. In that case, data for 60 and over or other age segments is used.

The City has **9,136** persons (2000 Census) **55 years and over**, making up 15% of the total population. 2010 will be a benchmark year for a shift in the growth of the aging population. In that year the projected growth rate of the 55+ population in Milpitas will be 58%, creating a total of 14,400 persons aged 55 and over in Milpitas. By 2020, the 55+ population is projected to more than double to equal **19,900** persons, The following demographic highlights are key indicators used to evaluate future needs.

- The City of Milpitas will continue to experience growth over the next 20 years as the population grows by 21% from 62,698 to 77,100 by 2020.
- The 55+ age cohort will grow from 15% of the total City population to 26% of the total by 2020.
- The highest rates of population increase will be among those 85 and over. Many of these will be women living alone.
- The dominant race in the City is Asian. This group grew by 18.9% from 1990-2000 and makes up 52% of the total population.
- The 55+ population has a higher percentage of White 49%, with Asian population at 37% and Hispanic, 11%. (1990 Census)
- 69.8% of the 17,364 housing units in Milpitas are owner-occupied. Persons 55+ make up 29% of the owner occupied dwellings.
- Average household size in Milpitas is 3.47, the largest household size in the County. This is projected to level off at 3.51 persons.
- By 2020, households in Milpitas will grow by 23.9% to 21,200. 10,100 half of the household will be 55+.
- Milpitas median household income is $88,343 per 2000 Census.
- 33% of Milpitas seniors 65 and over have incomes under $25,000. 34% have incomes over $75,000.

[2] ***Successful Aging,*** John Rowe and Robert Kahn.

- Milpitas offers 52,090 jobs to the local economy with a jobs-to-housing ratio projected for 2005 to be 3.1 to 1, the third highest ratio in the County.

- ABAG ***Projections 2000*** indicates that many adults 65 and over in Santa Clara County will remain in the work force.

- A Santa Clara County Council on Aging Survey found that 23.8% of those 55+ were employed full time.

- Of those respondents still in the work force almost 40% expect to work after retirement.

- 83.6% of survey respondents would choose to work on a part time basis after retirement.

National trends provide insight into the potential lifestyle choices of different groups. Of particular interest in this analysis are the trends and interests of the baby boomer generation, those individuals born from 1946-1964, now labeled the young-old. They will be the future users of senior services and facilities.

- Increased life expectancy is affecting how those turning 50 today plan for their future.

- Many baby boomers are caregivers for their aging parents. A typical caregiver is a woman 45-55 who works full time and spends 18 hours a week caring for her 77-year-old mother.

- 54% of the boomers are likely to be caring for their children and their aging parents, commonly referred to as the *Sandwich Generation.*

- As the boomer women age, they will support aging creatively and will demand greater involvement in the decisions that affect their lives.

- Statewide, older Californians are better educated and have more income today than their predecessors.

- An AARP survey found that 57% of Americans 50 and over reject traditional four-walled, teacher-classroom settings.

- Older learners are most interested in subjects that would improve the quality of their lives, build upon current skills or enable them to take better care of their health.

- US Census Survey found 24.3% of households 65 and over had a computer and 17.7% have home Internet access.

- Baby boomers are twice as likely as older non-retirees to believe their desire to work is an obstacle to their retirement.

- A Santa Clara County Council on Aging Survey of Santa Clara County residents 55+ found that 85% of the respondents expected to continue living in their current community.

- Family will play an important role in the baby boomer retirement; 57% expect to live near at least one of their children; 70% say they look forward to being a grandparent.

City's Current Performance

As part of the Needs Assessment a benchmark survey of senior services offered by comparable cities was conducted. This was done to establish a baseline of services and programs provided and compare Milpitas' budget, services and performance with comparable cities. The six cities included in the survey were Fremont, Mountain View, Palo Alto, San Jose, Santa Clara and Sunnyvale. The survey questions focused on services related to recreation and community services, typically offered at a Senior Center, transportation services and housing for seniors. Detailed survey results are in Appendix I and J and a summary is in Exhibit B.

Milpitas compares favorably with the other cities in the variety of services and the level of financial support provided by the City to deliver these services. In several areas Milpitas out performs the other cities. Some key findings follow.

- Milpitas has the lowest 55+ population of the seven cities with **15%** of the total City population or **9,136** persons.

- Milpitas has the highest per capita cost for its 55+ population, 9,136 persons. Milpitas spends **$62.13** per capita. Milpitas' cost per capita is higher because it has fewer 55 + residents to spread the basic costs of operating the Senior Center and its programs.

- Milpitas has seven (7) Full Time Equivalent (FTE) positions. This provides one (1) employee for every 1,305 persons. This is the highest staff to employee ratio of the seven cities. Milpitas provides a higher level of service with a full time Case Manager additional nutrition support staff and a van driver.

- The City's operating budget for Senior Services is **$567,646**, which is higher than the cities of Mountain View, Santa Clara and Sunnyvale. All these cities have higher 55+ populations and total population.

- Milpitas has 234 existing senior housing units. This places Milpitas behind Palo Alto and Mountain View in housing units per capita, with .026% senior housing units/55+ resident.

- Milpitas offers seniors and disabled residents a $1.70 ride subsidy for VTA paratransit services. This is the second highest ride subsidy offered by the seven cities. Only Palo Alto and Mountain View offer higher subsidies at $2.50 per ride.

- The City provides the highest level of city funding at **$63,163** toward nutrition and meals programs and serves more participants (1800) on a monthly basis than the other cities. The City also funds ethnic and vegetarian meals, not offered by all of the other cities.

- Milpitas Senior Center provides one (1) square foot per 55 + resident. This is comparable to most of the other cities. Mountain View has the highest square footage per 55 + resident at 1.99 square foot per capita.

Needs Analysis

The City is effective in addressing many of the current needs of its older adult population. However, simply the growth in the older adult age group, as presented in the Demographics Analysis, will increase needs and demands for services. The most

immediate needs based on community input and the research and analyses completed are summarized here.

Adult Day Care - Of particular note is the increase in the population 85 years and over. Many of these are elderly women living alone, who need assistance from their families and public service agencies. The concerns voiced by the local agencies interviewed and the community members participating in the public process identified gaps in service locally, for adult day care, care giving support and housing. Currently 81 residents use services in San Jose and Fremont to meet their needs for adult care. Milpitas residents make up nearly one-third of the users of the Alzheimer's Center in San Jose. Coupled with the need for adult day care, is the need for support for caregivers and their families.

Rental Housing - Although many adults 55+ in the City, currently own and live in their own homes, as they age this may become more difficult. They will seek other alternatives such as rental housing, assisted living or move in with their children. The COA survey discussed previously found Santa Clara County residents prefer to stay living in their current communities. Elders prefer to age in place and this will challenge cities to develop housing alternatives to single-family home ownership. The Housing Analysis in Chapter X provides a detailed analysis and forecasts housing needs.

ESL Instruction and Translation Services - *Milpitas is a City* with many cultures and is challenged to accommodate those who do not speak English. Non-English speaking older adults face many challenges in trying to secure needed services. This has created a need for public information that they can access and understand, translation services and ESL instruction and tutoring.

Computer Access and Training - As the number of older adults online increases, the need for Internet access and computer skills increases. The current seniors are eager for computer training in a non-threatening setting to facilitate their learning. This need will drop off as the tech-savvy boomers, who have these skills, age.

As the baby boomers age, their sheer numbers will drive the need for a variety of services and space to house those services. By 2010 there will be 14,400 adults age 55 and over in Milpitas. This gives the City some time to plan for these future needs. Based on current research and trends, it is expected their demands for programs and services will center on those that will foster healthy, active and exciting lifestyles. The City and other local agencies currently offer many of these programs. Improvement and expansion of services in the following areas are viewed, as the likely **future** needs.

- Health and Wellness Programs and Health Education
- Lifelong Learning
- Outdoor Recreation Adventure and Travel

The boomers will seek programs that are at convenient times and easily accessible locations. This may require a change in the type of facilities and the times that programs are offered.

Facility Analysis

Programs responding to the needs identified could be housed in a number of community facilities such as Senior Center, Community Center or schools, where space is already shared for a number of programs. Centralization of some of these programs in one convenient location can be beneficial to users. However, this may become difficult, if demand for programs exceeds the capacity of the existing Senior Center.

The needs analysis process identified users' need for equipment and facilities that accommodate older adults. Special lighting, acoustics and furniture are some of the improvements that could address this need. Other needs expressed by users focused on changing the image, ambiance and accessibility of the existing facilities and services. Addressing these needs might require a change in the character of the services or facilities, but not require additional space. The constraints of the existing building's historic designation, its age, the cost of modification and the available space to work with are problematic.

Although the Senior Center is a busy place during weekday "prime time," there is excess room capacity of approximately 52%. This capacity does provide some flexibility to schedule existing or additional programs at times other than weekdays. The evening and weekend hours available could help accommodate the program needs of working retirees. This option should be considered prior to a decision to expand or build facilities.

The challenge of meeting the diverse needs of older adults need not be limited to one site. The use of multiple sites and or shared sites with schools, community colleges, shopping malls, senior housing facilities are all options to consider in conjunction with discussion of new or expanded facilities.

Age is mind over matter. If you don't mind it doesn't matter.

- George Burns

Opportunities & Recommendations

The needs assessment process has identified several strategic opportunities for the City to consider in planning for the future. These opportunities are not intended to be inclusive of all the City's functions and activities. Rather, they present opportunities that are responsive to the current demographics of the 55+ residents of Milpitas, current recreation trends and expressed community needs that surfaced during this process. The opportunities build on the City's strengths and may emphasize a different role for the City in some areas. It is believed that these opportunities will position the City for the future and enhance its capability to secure needed resources and plan strategically for an aging population. These opportunities will change as the community changes and will need to be re-evaluated on a regular basis to remain responsive to changing needs, trends and priorities.

The City is in a strong position to move forward with the implementation of the strategies identified to meet current and future needs. The City's commitment to serving older adults is proven when comparing Milpitas' service levels with those of the other cities in the Benchmark Survey. With the growth in the 55+-age cohort and the emergence of baby boomers as customers for adult services, new program priorities unfold.

With the constraints of fiscal and human resources, it is a challenge for decision makers to select priorities for strategic implementation. The recommended strategies presented in Chapter XI are based on the needs analysis process presented in Chapters VIII – X. All of the strategies are deemed important. However, in some areas the needs are not being met at all or only to a limited degree, e.g. adult day care. In other areas needs are met at some level but improvements are needed to better address current and future needs. Some of the strategies recommended simply call for the continuation of good practices and partnerships already in place. Not all the strategies proposed require additional funds; many simply focus on an operational change to meet the needs. The following table categorizes the top

priorities to help guide decision-making and allocation of resources, in the future.

Tier 1 presents strategies that respond to needs that are unmet or met to a limited degree. Therefore, these strategies are deemed as higher priority. Implementation of these strategies will begin to address the most immediate needs identified through the needs analysis process.

Tier 2 strategies are those that propose improvements to existing service levels to address users' changing needs and to enhance existing services. These needs are less immediate and improvements can be facilitated by the existing organizational structures in place.

Strategic Priorities

Tier 1 - Recommended Priorities	**Implementation Responsibility**
Facilitating Dependent Care	
• Establish an Adult Day Care Center in Milpitas	City with non-profit provider
• Offer caregiver skill development programs	City collaborate with health care providers
• Provide community support networks for caregivers and families	City partner with other agencies
• Consider a granting program to offer subsidies for adult day care for those users who cannot afford to pay the fee	City with health care associations
Providing Accessible and User Friendly Facilities	
• Design new facilities and rehabilitate existing facilities to improve access and accommodate the special needs of older adults	City
Enhancing Cultural and Generational Unity	
• Initiate intergenerational programs	City
• Evaluate the needs of multi-generational families	City with County Social Services
• Provide staff training in multi cultural programming and awareness	City
Advancing Information Access through Technology	
• Develop interactive online City information re. older adult resources and services for seniors	City
• Develop Community Computer Lab and training for older adults	City
• Incorporate wiring and cabling for the latest technology to senior facilities and housing	City with public utilities
Planning for Housing Options	
• Pursue public/private partnership for future senior housing development in the city	City
• Encourage planning that converts neighborhoods to elder-friendly places that may include in-fill housing for seniors	City
Support Transportation Options	
• Encourage new senior housing facilities to include shuttle service for residents	City
• Consider the feasibility of a fixed route cross-town shuttle	City
• Encourage volunteer non-profit, escort service for seniors to transport them to shopping etc.	City with non-profit

Tier 2 – Recommended Priorities	Implementation Responsibility
Fostering Health and Wellness	
• Expand fitness and wellness programs, and sports leagues targeted to adults 55+ utilizing the facilities at the Milpitas Sports Center	City
• Consider offering evening aerobics, fitness and mind/body activities that cater to the baby boomers at the Senior Center or Sports Center	City
• Provide health clinics at the Senior Center for various health needs: hearing, vision, podiatry and others	City and health care associations
• Expand health education programs both day and evening for older adults that include nutrition, mental health, alternative (non-western) medicine, stress management and "how to" access health and wellness programs	City
• Serve as a community-based center for information and support groups for widows, cancer survivors and other illnesses	City with health care associations
Promoting Lifelong Learning	
• Expand offerings in ESL and citizenship	City with Adult Education
• Collaborate with Community College and others for emeritus programs, workshops, courses and lectures that cater to the new-old	City with Community College or other educational institutions
• Offer educational travel opportunities and cultural outings with an emphasis on "off the beaten path" scheduled to attract the working retiree	City
• Consider opportunities for online learning that might be preferred or necessary for the homebound senior	City with Adult Education/Community college
• Develop fee-based programs for business and industry that focus on retirement planning and issues related to aging	City with local businesses
Strengthen Outdoor Recreation Experiences	
• Utilize the resources of Ed Levin Park and other County parks for picnicking, interpretive programs and other outdoor recreation activities	City collaborate with the County Parks Department
• Develop City parks that provide accessible facilities, trails and areas for relaxation with the older adult in mind	City
• Plan outdoor recreation excursions from hiking and bird watching to adventures such as river rafting and rock climbing to appeal to the various interests of the 55+ adults	City with outdoor oriented groups such as the Sierra Club
Providing Accessible and User Friendly Facilities	
• Change the name of the Senior Center to Community Adult Center or other name	City
• Pursue the expansion of operating hours to include evening and weekends for the Senior Center, Community Center and Sports Center to accommodate working older adults	City
• Improve access, lighting, and sound system in the existing Senior Center	City

Tier 2 – Recommended Priorities	Implementation Responsibility
• Consider improvements to the existing Senior Center: ◊ Juice/coffee bar ◊ Commercial kitchen ◊ Additional storage areas ◊ Rest room upgrades ◊ Enclosure of the courtyard area to enable year round use for table games and lounge area ◊ The addition of an outdoor games area and patio ◊ Relocate any non-senior support staff to other sites to free up space for use as counseling rooms or small group activity	City
Enhancing Cultural and Generational Unity	
• Facilitate bilingual instruction in ESL for non-English speakers	City with Adult Education
• Develop tutoring programs for adults in ESL and literacy	City with County Library or organizations
• Offer workshops and discussions on different cultures and history to foster cultural understanding	City
• Showcase different cultures in special event programming to enhance cultural unity	City
Planning for Housing Options	
• Provide incentives to encourage private development of senior rental housing and assisted living facilities. Consider the reduction, subsidy or elimination of development fees for affordable senior housing	City
• Work with legislators and Building Officials to modernize regulations, codes and financing of assisted living facilities and residential care facilities	City with League of Cities and/or ICBO
• Assist seniors through Home Access program and/or other assistance grants with home improvement, special equipment and repairs to allow them to age in place	City and non profits
• Pursue public/private partnership for future senior housing developments in Milpitas	City with developers
Support Transportation Options	
• Provide transportation information online to inform seniors about transportation services	City with VTA
• Improve on-time response and reliability of Outreach taxi service	City with Outreach/VTA
• Schedule local outings on weekend and evenings to sporting events, theatre and regional destinations	City and local clubs and organizations
Improving Marketing and Communications	
• Provide verbal and written public information in the language appropriate for the target group	City
• Utilize all media including non-English to market programs and services	City with media
• Initiate expanded use of the City's web site to facilitate interactive online transactions	City
• Design marketing efforts to promote a positive image of older adults and their value to the community	City

Tier 2 – Recommended Priorities	Implementation Responsibility
• Design marketing efforts to promote a positive image of older adults and their value to the community	City
• Minimize age-segmented marketing, use value-positive terms, and market to the interests of 55+ adults: healthy lifestyles, cultural enrichment, travel experiences	City
• Identify current customer base survey and track their satisfaction with programs and services. Use feedback to make changes in customer service and programming	City
• Network with other public agencies, community groups, and health care providers in cooperative marketing efforts to reach new customers	City with other service providers
• Foster a cooperative partnership with local media and Cable TV to develop features, op-editorials, as well as news items on older adult's accomplishments and experiences	City with local media

We are happier in many ways when we are old than when are young. The young sow wild oats, the old grow sage.

-Winston Churchill

II. Introduction

The **City of Milpitas, California,** located in Santa Clara County offers a variety of programs and services for older adults in the community. Growth in the aging population has precipitated an increased demand for senior housing and senior services and programs. In May of 2001, the City recognized the need for a comprehensive **Needs Assessment Study** focused on Senior Housing, Adult Day Care Services, Transportation, Senior Center Facilities and Programs for the Milpitas senior population. The City Council initiated the study, following the Senior Advisory Commission's report on the need for a new Senior Center.

The City currently operates a Senior Center, which provides a variety of senior services, programs and activities. The Center, which is on the National Registry of Historic Places, was renovated in 1994. The center may not have the capacity and structural design to accommodate future senior needs.

The City owns Terrace Gardens a 150-unit senior housing project. This project serves low-income seniors with one-bedroom apartment units and a common dining area. The complex has 100% occupancy and a 6-10 year waiting list of 500 applicants. The City also offers a host of senior assistance services that include paratransit, case management, social services and meals programs.

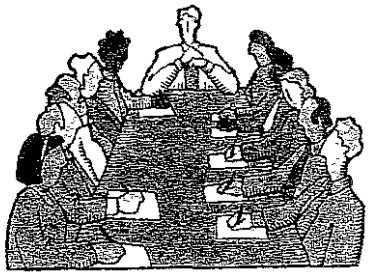
In June of 2001 the City retained the service of **Harison & Associates** to complete the **Senior Needs Assessment. Research Network, Ltd.** is the sub-consultant retained to complete the rental housing needs analysis as part of the assessment. The purpose of this assessment is to identify and assess the needs of the senior population and provide ample opportunity for community input and interaction. This collaborative process has involved the City staff, the Senior Advisory Commission, the City Council and local community service providers. The Needs Assessment includes demographic analysis and population projections, trend analysis, a benchmark survey of comparable cities, services inventory and evaluation of existing services and facilities and the identification of strategic opportunities for the future.

Grow old with me the best is yet to be. Robert Browning

III. Approach and Methodology

The approach to the Senior Needs Assessment is an objective and comprehensive view toward the future needs of Milpitas older adults. This approach is based on the premise that ***services drive facilities***. A thorough assessment of the need for services is required before allocating funds for new facilities or programs. The goal of the assessment is to provide a working, planning tool based on stakeholder participation that will provide the City with a basis for decision-making and determine the priorities for facility development and service delivery in the future. To that end this report:

- Provides a comprehensive overview of the current and projected needs for senior services.
- Provides a means for understanding those needs in terms of physical space that may be required.
- Recommends a physical response, if needed, to address those needs.
- Evaluates service delivery options for meeting needs.
- Identifies strategic opportunities for future planning and investment.



The methodology utilized to ascertain the senior needs included research and review of existing needs surveys and the following community processes to solicit input on the needs and priorities.

- Stakeholder Focus Group
- Written Questionnaires from Focus Group members
- Community Workshop
- Interviews of Service Providers of Senior Services
- Interviews of City Council Members
- Benchmark Survey of Comparable Cities

The information gleaned from this process and the demographic and trend analysis formed the basis for study and analysis to identify gaps in service and future program, operational and facility needs. Following the needs analysis, opportunities and strategies are recommended.

IV. Demographic Analysis

The demographic analysis is the primary base of information used to evaluate and project current and future service needs for a given population. The focus of this project is housing, transportation, social and recreation needs of adults aged 55 and over in the City of Milpitas, which is located in Santa Clara County, Supervisorial District 3. Where data specific to the City of Milpitas is not available, regional and nationwide socioeconomic trends of older adults will be used. An effort was made to use specific data for the population aged 55 and over for all the analysis. However, there are instances when data was not available for that age segment. In that case, data for 60 and over or other age segments may be used. Demographic trends to be analyzed include the following.

- Population
- Age/Gender
- Income
- Ethnicity
- Education/Employment
- Housing

> California is pioneering an aging diverse society, and can serve as a model to other states.
> - Institute for the Future

Population

The City of Milpitas's population based on U.S. Census 2000 is 62,698 persons. Based on the Association of Bay Area Governments (ABAG) Projections 2000 the population will grow by 21% by 2020, when the population will be 77,100. This brings 14,402 new residents to the City. This growth is in the middle range when compared to other cities in the County. South County cities will have higher growth rates.

Milpitas has 17,132 households. 48.55% of households have individuals under 18; 19.1% of households have individuals 65 years and over. 2.9 % of the householders are 65 years and over. The average household size is 3.47 persons, which is the highest density in the County. Average family size is 3.72. ABAG projects that Milpitas will have 21,200 households by 2020.

Age Characteristics

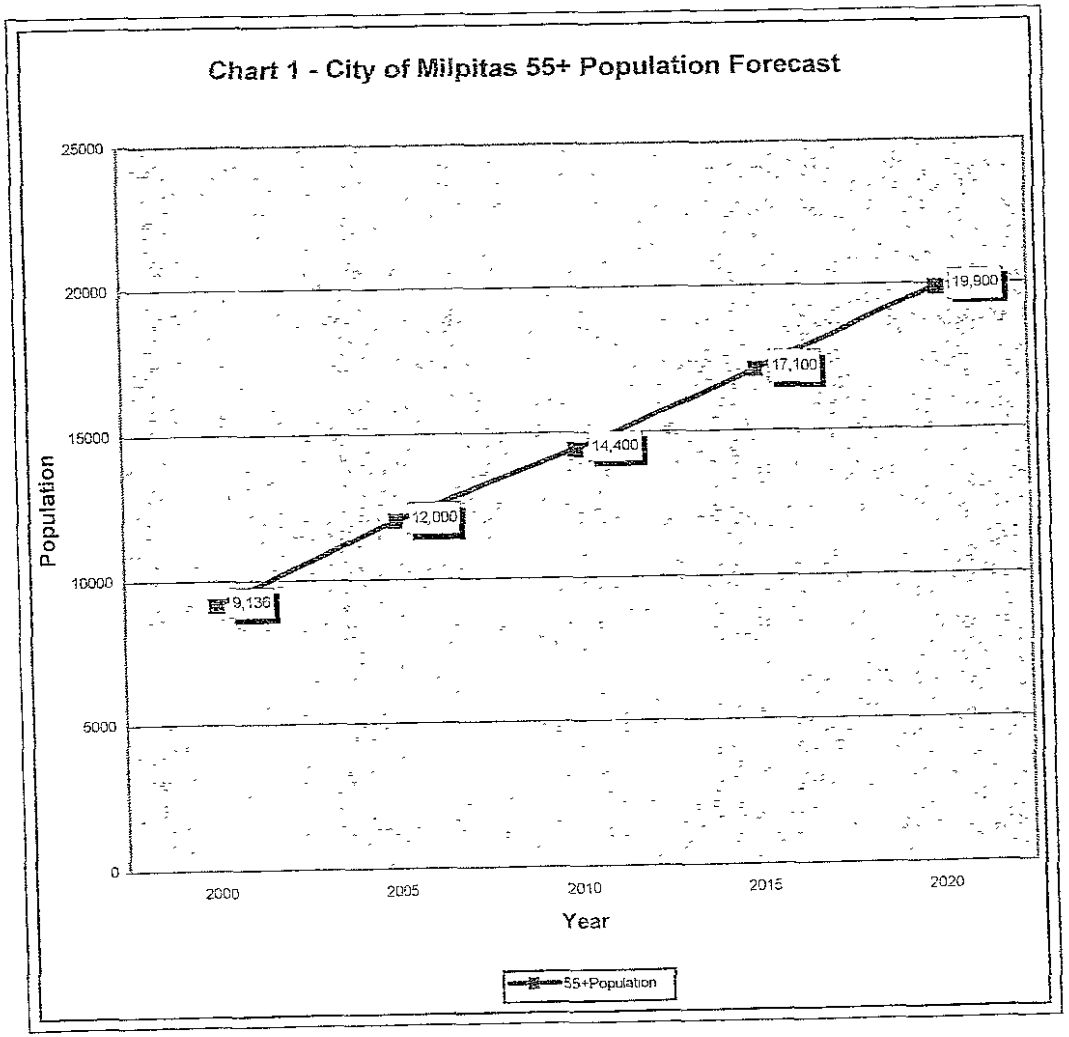
The median age for Milpitas is 33.4 years. This is a young median age when compared with other cities in the County. The City has 9,136 persons 55 years and over, making up 15% of the total population. The 65 years and over population is 4,411 equaling 7% of the total population. The 65+ population grew by 6% from 1990-2000.

Table 1 - City of Milpitas 55+ Population by Age
(Census 2000)

Age Distribution	Number	Percent
Total	62,698	100
55-59 years	2,611	4.2
60-64 years	2,114	3.4
65-74 years	2,877	4.6
75-84 years	1,241	2
85 years and over	293	.5
Total 55+ years	**9,136**	**15**

2010 will be a benchmark year for a shift in the growth of the aging population. In that year the growth rate of the 55+ population in Milpitas will be 58% and there will be 14,400

persons aged 55 and over in Milpitas. By 2020, the 55+ population is projected to more than double to equal 19,900 persons aged 55 and over. (Chart 1). This graying of California will have profound impacts on all aspects of public service.



Average life expectancy for Californians is 77 years from birth. The largest rates of population increase will occur among the very oldest of Californians, those 85 and over. Between 1970 and 2000 this population grew more than threefold. Projections indicate that this group will increase almost fourfold between 2000 and 2040.[3] Women turning 85 can now expect to live seven more years and men will live six more years. By 2020 the youngest "baby boomers" will be 56 years old and one of every three Californians will be over the age of 50.

The rapid growth of the "old-old," those 85 and older, will be a challenge for service providers stretching resources to provide interventions focused on maintaining the independence and safety of the "old-old." Many of these will be women living alone. At the same time, the "new-old" baby boomers may begin to seek services from agencies serving older adults. The service needs may be very different.

It takes a long time to become young – Pablo Picasso

Gender

57% of the 65 and over population of Milpitas is female. Historically women have outnumbered men in the older population due to increased longevity. Accordingly, the gender disparity increases with advancing age and is most notable among persons 85 or older. Through the years 2000 to 2010 there are twice as many women 85 years and over than men. The gap is reduced to 65% more women than men by 2020. When planning for future needs of older persons, the gender factor needs to be considered for several reasons:

- Women generally have fewer financial resources than do men, particularly in older age.
- Women are more often the caregivers for spouses, parents and grandchildren.
- Higher levels of care-giving support may be needed.
- Many elderly women do not have a spouse for assistance.
- More elderly women live alone.

In 1993, nationwide statistics reveal that non-institutionalized elderly men were nearly twice as likely as their female counterparts to be married and living with their spouse (75 percent versus 41 percent). Elderly women on the other hand were more than three times as likely as elderly men to be widowed (48 percent versus 14 percent).[4] Thus, when health fails most elderly men have a spouse for assistance, most elderly women do not.

Another consequence of the relative scarcity of elderly men is the fact that elderly women were much more likely than men to live alone. The likelihood of living alone increased with age. For women, it rose from 32 percent for 65-74 year olds to 57 percent for those aged 85 years or more; for men, the corresponding proportion were 13 percent and 29 percent. Male life expectancies are expected to increase 1.4 years more than female life expectancies.[5] As more men live to older ages, some of the gender differences may narrow somewhat.

[3] ***Graying in the Golden State,*** Public Policy Institute of California, November 2000.

[4] U.S. Census Statistical Brief – 1995, page 4.

[5] op. cit. ***Graying in the Golden State.***

Living Alone

In assessing the social needs of older adults, their living arrangements may dictate the need for additional services. Living alone is a factor associated with the risk of illness, injury and premature institutionalization of those 65 and over. In Santa Clara County District 3, 20.6% of the 65+ population lived alone.[6] This District includes the City of Milpitas and has the lowest concentration of elderly living alone. 499 (2.9%) householders over 65 live alone in Milpitas. Living alone correlates with advanced age. Nationwide, three of every five women, aged 85 and over, live alone. As the numbers of old-old living alone increase, outreach services and transportation will be key to assist this segment of the population retain their independence.

Ethnicity

California is pioneering in an aging diverse society and Milpitas clearly represents that diversity. The table below shows race and ethnicity for the City's total population

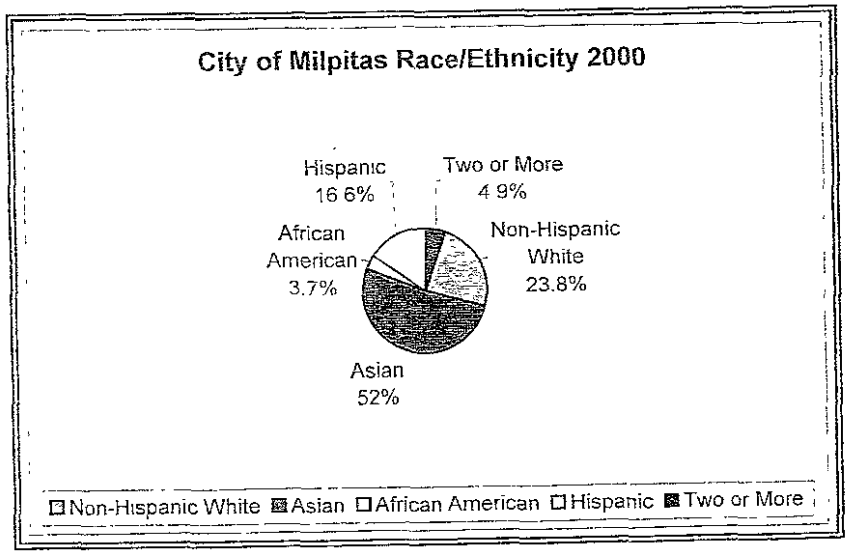
Table 2 - City of Milpitas Ethnicity (Census 2000)

Ethnicity	Number	Percent
Non Hispanic White	14,917	23.8
Black	2,295	3.7
American Indian	388	.6
Asian/Pacific Islander	32,875	52
Hispanic (any race)	10,417	16.6
Two or more races	3,100	4.9

6 Santa Clara County Regional Report, *Coming of Age* in Santa Clara County-1998.

The dominant race in the City is Asian. This group increased by 18.9% from 1990–2000. The Asian population is further divided into several ethnic groups. The largest being Filipino at 15% followed by Vietnamese at 13% and Chinese at 12.9%. The city's Consolidated Plan (1997) estimated 17% of the Asian population is foreign born.

From 1990-2000, the City's non-Hispanic white population decreased by 18%, the Hispanic population decreased by 2% and the Black population by 2%.



55+ Ethnicity

There is no current Census 2000 data available that breaks down ethnicity by age group. It is likely the ethnicity of the 55+ population is similar to the total City population. In 1990, the ethnic profile of the City senior population (65+) revealed that 49% of this population identified themselves to be White. The remainder of the City seniors in 1990 were Asian (37%) or

Hispanic (11%). A very comparable pattern was also exhibited by those seniors 55 years or older.

To serve a culturally rich older population and respond to diverse needs of ethnic groups, a level of cultural proficiency is needed in planning service delivery. A key element of cultural proficiency and equity in the delivery of services is the capacity of the system to accommodate those who do not speak English.

The Santa Clara County Council on Aging (**COA**) 1998 Survey found that in District 3 which includes Milpitas, 12.4% of those 65 years and over spoke only a non-English language. For 8.3 % of the sample the non-English language was Asian. The 1990 Census identified 19,139 Milpitas residents over the age of five (5) years, approximately 41 % that spoke a language other than English. 25% of the non-English speakers spoke Spanish and 64% spoke an Asian language. Many new immigrants, particularly older adults, can become linguistically isolated. This points out the need to provide translation services to facilitate access to programs and services for the older adults.

Income

Individual and household income is a key factor in determining the health and well-being of older adults, the need for services and access to services. Milpitas's median household income based on Census 2000 was $88,343.

Table 3 charts household income for seniors 65 and over and shows that 33% of the seniors have incomes under $25,000, a modest income for Santa Clara County. 34% have incomes over $75,000. These income patterns mirror the senior household income for the County. Table 3 also shows the income decline with advancing age. There is however improvement county-wide in the percentage of older adults experiencing income decline past 75 years of age. According to 1990 Census data, 62% of County residents 75+ had incomes below $25,000. The Census 2000 shows 40% of County residents 75+ have incomes less than $25,000. Milpitas residents 75+ with incomes below $25,000 equal 45% of that age cohort.

The decline in income with advancing age often results in increased needs while the resources to pay for services erode. However, the Public Policy Institute, in its research for *Graying in the Golden State,* found that older Californians 65 years or older have experienced lower poverty rates than other age groups. Poverty rates for older Californians have remained below 10 percent. The research also found that the poorest older Californians rely on Social Security and that immigrants rely on Social Security more than other Californians.[7]

If I'd known I would live this long I would have taken better care of myself. – Jazz musician Eubie Blake, at age 97.

[7] op. cit. ***Graying in the Golden State.***

Table 3 - City of Milpitas Senior Households Income

Household Income	Seniors 65-74		Seniors 75 and over		Total Seniors	
	Number	Percent	Number	Percent	Number	Percent
Less than $15,000	113	9.1	202	29	315	16.2
$15,000 to $24,999	201	16.1	114	16.4	315	16.2
$25,000 to $34,999	128	10.3	58	8.3	186	9.6
$35,000 to $49,999	137	11	60	8.6	197	10.1
$50,000 to $74,999	185	14.8	89	12.8	274	14.1
$75,000 or greater	484	38.8	174	25	658	33.8
Total Households	**1248**	**100**	**697**	**100**	**1945**	**100**

Source: City of Milpitas Housing Element (Claritas Inc. 2001)

Educational Attainment

Research has shown that the better educated tend to be healthier longer and better off economically. As this new-old age cohort ages, the older adult population will have strong educational backgrounds. Statewide, today's older Californians are better educated than their predecessors. As the younger, more educated cohorts approach retirement age the type of service and products needed will likely change. Table 3 demonstrates the change in educational attainment.

Table 4 - Educational Attainment, California 1998
(Percent of age group with bachelor's degree)

Age	Total	Males	Females
35-49	28.8%	31.2%	26.5%
50-64	29.3%	32.6%	26.3%
65+	18.8%	24.4%	14.2%

Source: State of California, Department of Finance

The 1990 Census revealed that 81% of the Milpitas residents were high school graduates or higher. 24.9% had achieved the level of bachelor's degree or higher. When Census 2000 data is available, it is likely that educational attainment will have improved. The wealth of professional and technical jobs in the area, higher incomes, and the higher education facilities available bode well for gains in educational attainment.

Work Patterns

ABAG Projections 2000 indicate that many adults 65 and over in Santa Clara County will remain in the labor force. The COA Survey in 1999 found that 23.8% of those 55+ were employed full time. 8.2% were employed part time. Of those survey respondents still in the work force, almost 40% expect to work after retirement to generate sufficient income. 83.6% would choose to work on a part time basis after retirement. The Milpitas jobs to housing ratio projected for 2005 is 3.1. to 1, the third highest ratio in the County. In 2000, 33,800 Milpitas residents, just over 50% of the population, were employed.

I grow old ever learning many things.
-Solon 630-555 B.C.

The City offers 52,090 jobs to the local economy.[8] Even though the Bay Area is currently experiencing an economic downturn, there are job opportunities for those who want to continue working full time or part time. The COA report shows approximately 30,600 persons or 17% of those over 65 will be in the labor force in 2000, 48,000 persons (19.6%) in 2010 and 98,500 persons (26.9%) in 2020. It is reasonable to expect that Milpitas's population over 65 will continue working at levels similar to the County projections. With the normal retirement age for social security advancing from 65 to 67, it is conceivable that the baby boomers will be required to work several years beyond the retirement age of previous retirees.

The notion that many will work during their retirement years is validated by a recent study *Baby Boomers Envision Their Retirement* prepared by Roper Starch Worldwide. Inc. and AARP. This study found that most baby boomers intend to be working during their retirement years.

- Eight in ten baby boomers say they plan to work at least part time during their retirement; just 16% say they will not work at all.
- A little over a third (35%) say they will work part time mainly for the sake of interest and enjoyment.
- About one-quarter (23%) say they will work part time for the income it provides.
- About 17% envision starting their own business and 5% will work full time at a new job/career.[9]

Housing

According to the 2000 US Census, there were 17,364 housing units in Milpitas. 69.8 percent of the units were owner-occupied. 19.1% of the households had individuals over 65 living there. Persons 55+ made up 29% percent of the owner-occupied dwellings. Persons 55+ made up 13% of renter-occupied units. The average household size in Milpitas is 3.47 persons. This is the largest household size in the County. This high density should decrease with the aging of the population and with the new construction of multi-family units.

Nationwide statistics cited in ***Profile of Older Americans, 1999*** published by AARP, indicate of the 20.9 million households headed by older persons in 1997, 79% were owners and 21% were renters.[10] A 1999 survey by the Santa Clara County Council on Aging shows a similar pattern of home ownership. The survey found that 80 percent of Santa Clara County 55+ age group own their own homes and 16 percent of this population are renters. This is the highest proportion of home ownership on any Santa Clara County age group.

The most recent AARP Survey 2000[11] on housing included interviews with persons age 45 and over to capture the opinions

[8] ABAG, *Projections 2000.*

[9] ***Baby Boomers Envision Their Retirement***, Roper Starch Worldwide Inc. and AARP – 1999.

[10] ***A Profile of Older Americans***, 1999, AARP and AOA.

[11] ***Fixing to Stay: A National Survey on Housing***, 2000, AARP.

of the baby boomers. The large majority of Americans age 45 and over live in single family residences with 77% living in single-family detached homes. Other findings include the following.

- Americans age 45 and over tend not to move frequently, approximately three in five have lived in their current home for 11 years.
- People age 45 and over generally share their home with at least one other person, most likely a spouse.
- Most Americans age 45 and over say they would like to remain in their current residence for as long as possible, 71 percent of the respondents strongly agree that they want to stay in their current residence as long as possible.
- If they need help caring for themselves. most respondents would prefer not to move from their current home (82%).
- Among respondents 45 and over nearly one in four expect that they, or a member of their household, will experience problems getting around their home within the next five years.
- Most respondents (86%) have made at least one simple change to their home to make it easier for them to live there.

Some of these national trends are applicable to Milpitas. However, the high cost of housing in the Bay Area limits retiree migration into the area. According to Silicon Valley Real Estate Report, the median home sales price (October 2001) for Milpitas was $402,000. The high cost of housing, in part attributes to the boomers need or preference to continue working during retirement.

The growth in the 55+ population will come from longer life expectancy and the aging of the baby boomers, not migration into the area. ABAG research for Projections 2000 found that residents like the Bay Area and choose to stay here. The climate, recreational opportunities, employment and educational opportunities all bode well for the "lifestyle" of the new-old.

In *Graying in the Golden State* published by the Public Policy Institute of California in November 2000, research found that interstate migration rates are lower for people 60 and over than for any other age group. During the entire 1990's decade, the net outflow of older Californians totaled less than 3 percent of all older California residents in 1990.[12] During the entire decade of the 1990's the new out flow of older Californians totaled less than three (3) percent of all older California residents in 1990. In 1997, AARP found only 5% of persons 65+ moved since 1996 compared to 18% of persons under 65.[13]

Transportation

The 1999 COA survey queried the 55+ sample on their means of transportation. This sample has a reliability of +/- 5%. The findings in the countywide sample are applicable to Milpitas. The survey found that 80.8% of the 55+ population in Santa Clara County drive themselves as their predominant form of

[12] op. cit. ***Graying in the Golden State.***

[13] op. cit. ***A Profile of Older Americans.***

transportation. More than 7% walk as their principle mode of transportation and another 3.6% use mass transit.

When asked about the adequacy of their transportation arrangement, 89.2% responded that their arrangements were adequate. 10.8% viewed them as inadequate. When respondents 55+ were asked if they experienced difficulty in going outside their home, 9.2% responded that they had difficulty. The mobility limitation were higher for those 65 and over with approximately 11% having difficulty. For those elders experiencing mobility problems, many (54.8%) rely on either a spouse, partner or child to assist them when they need to leave their homes for shopping or medical appointments. 8.2% of the respondents reported that they have no regular source of transportation assistance, leaving them at higher risk of social isolation.

> Do not go gentle into that good night,
> Old age should burn and rave at the close of day.
> Rage, rage against the dying of the night.
> – *Dylan Thomas 1914-1953*

V. Population/Household Forecast

By 2020, Santa Clara County is expected to house 2,016,700 people, up 20% (an addition of 334.000 persons) from 2000. Thus, the next twenty years growth in population is anticipated to be 12% lower than that experienced historically (at 30% and 379,000 persons). County residents are expected to comprise 664,930 households by 2020, up 17.5% (99,000 households) by 2020. This compares with growth of 107,344 households during the past two decades.

Table 5 - Forecast County Population/Household Growth

	Population		Total Households (000)	Average People Per Household
	Total (000)	Seniors 55+		
1980	1,295	202	459	2.82
2000	1,683	296	566	2.97
2020	2,017	629	665	3.03
Change %	19.8%	112.5%	17.5%	2.0%
Change #	334	333	99	0.06

Source: ABAG "Projections 2000", December, 1999.

Thus, similar to forecast population growth patterns, household growth in the next twenty years is projected to be 8% less than during the past two decades. By dividing the anticipated added population by the forecast households growth, an average household size of new residents appears to be 3.37 persons, suggesting that the average number of persons per household will continue to escalate.

Compared to the overall population growth in the County (at 20% and 334,000 people), the growth in the senior population (55+) from 2000 to 2020 is anticipated to be a surprising 113%, an **addition** of 333,025 seniors. Thus, the County's senior population is forecast to more than double in the next 20 years, and, at that time, constitute nearly one of every three County residents (31%).

Table 6 - Santa Clara County Race/Ethnic Change

	White	Hispanic	Asian	Other
1980: Total	71%	18%	8%	3%
2000: Total	44%	24%	28%	4%
2020: Total	30%	30%	36%	4%
1980: 55+	80%	9%	5%	6%
1990: 55+	74%	12%	12%	2%
2020: 55+	49%	19%	28%	14%

Source: State of California, Dept. of Finance Pop Projections by Age/Race

The cultural changes in the County during the 1980 to 2000 time frame are forecast to continue to the year 2020[14]. Residents describing themselves as White are projected in 2020 to

[14] State of California, Dept. of Finance, Projections by Age/Race.

constitute 30% of the population (compared to 44% in 2000 and 71% in 1980). Further, the largest ethnic group in 2020, Asian, is forecast to comprise nearly 36% of the population and an additional 30% are to be Hispanic. In fact, the nominal volumes of Asian and Hispanic residents are each anticipated to outnumber the volume of White residents.

Examining the senior population (55+) in forecasts for the year 2020, it is projected that residents describing themselves as White will comprise nearly half (49%) of the seniors. The next largest senior population ethnic groups are expected to be Asian (28%) and Hispanic (19%).

City of Milpitas Population/Households/Ethnicity

Historical Overview

In the past two decades, the City of Milpitas has experienced population growth of nearly 66% overall (an addition of 24,878 persons). Concurrently, the volume of households increased by 51% (an addition of 5,796 households).

By dividing the added population by the added households, an average household size of new residents appears to be 4.29 persons. The differing rates of growth in population and households resulted in an increase in average household size from 3.27 in 1980 persons to 3.47 persons in 2000.

Table 7 - City of Milpitas Population/Household Growth

	Population		Total Households (000)	Average People Per Household
	Total (000)	Seniors 55+		
1980	37.8	3.3	11.3	3.27
2000	62.7	9.1	17.1	3.47
Change %	65.8%	175.7%	51.3%	6.1%
Change #	24.9	5.8	5.8	.20

Source. U S. Dept. of Commerce, Bureau of the Census.

Compared to the overall population growth in the City (at 66% and 24,878 people), growth in seniors 55+ from 1980 to 2000 was a more robust 176%, an addition of 5,841 seniors.

As the City grew, it became more culturally diverse as was also referenced in the County statistics. In 1980, 63% of the City residents described themselves as White with the remainder (37%) composed primarily of Hispanic (17%) and Asian (12%) groups. Two decades later, in 2000, 24% of the City residents report themselves to be White (vs. 63% in 1980) and the remainder (76%) is composed principally of Asian (52%) or Hispanic (17%) residents.

Examining the ethnic composition of the senior population (65+) within the City of Milpitas, 72% of this population in 1980 identified themselves to be White (compared with 63% of the general population).

Table 8 - City of Milpitas Race/Ethnic Change

	White	Hispanic	Asian	Other
1980: Total	63%	17%	12%	8%
2000: Total	24%	17%	52%	7%
1980: 65+	72%	11%	14%	3%
1990: 65+	49%	11%	37%	3%
1990: 55+	50%	13%	34%	3%

Source: State of California, Dept. of Finance Pop Projections by Age/Race

The remainder of the City seniors in 1980 was most often Asian (14% vs. a 12% figure for the entire population) or Hispanic (11% vs. a 17% figure for the entire population). This trend suggests that new non-White residents in the City were more likely to be under the age of 65 years.

By 1990, the ethnic profile of the City senior population (65+) revealed that 49% of this population identified themselves to be White. The remainder of the City seniors in 1990 was Asian (37%) or Hispanic (11%). A very comparable pattern was also exhibited by those seniors 55 years or older. These figures further reinforce the suggestion that new non-White residents in the City are more likely to be under the age of 55 years.

Forecast Trends

During the next two decades, the City of Milpitas is expected to reach a total of 77,100 people by 2020, up 23% (an addition of 14,400 persons) from 2000. Thus, the next twenty years growth in population is anticipated to be 42% lower than that experienced historically (at 66% and 24,878 persons).

Compared to the overall population growth in the City (at 23% and 14,400 people), the growth in the senior population (55+) from 2000 to 2020 is anticipated to be a surprising 119%, an **addition** of 10,800 seniors. Thus, the City's senior population is forecast to more than double in the next 20 years and, at that time, comprise one of every four City residents (26%).

Table 9 - Forecast City Population/Household Growth

	Population		Total Households	Average People Per Household
	Total	Seniors 55+		
1980	37,800	3,300	11,300	3.27
2000	62,700	9,136	17,100	3.47
2005	70,200	12,000	18,900	3.72
2010	72,900	14,400	19,800	3.69
2015	75,100	17,100	20,500	3.66
2020	77,100	19,936	21,200	3.63
2000-2020 Change %	23.0%	118.7%	23.9%	4.6%
2000-2020 Change #	14.4	10,764	4,100	.16

Source: U.S. Dept. of Commerce, Bureau of the Census.

City of Milpitas residents are expected to comprise 21,200 households by 2020, up 23.9% (4,088 households) by 2020. This compares with growth of 5,796 households during the past two decades. Thus, similar to forecast population growth patterns, household growth in the next twenty years is projected to be 29% less than during the past two decades.

By dividing the anticipated added population by the forecast households growth, an average household size of new residents appears to be 3.51 persons, suggesting that the average number of persons per household will begin to moderate.

VI. Trends Analysis

This section will review current literature and studies on the mature adult population, "baby boomer" generation and national trends. These national trends provide insight into the potential lifestyle choices of this group and will help public and private service providers plan for services and facilities to meet the needs and demands of this growing group of consumers. Some of the trends are more relevant than others to the analysis of future needs in the City of Milpitas.

The New-Old

Ken Dychtwald in his new book, *Age Power: How the 21st Century Will Be Ruled by the New Old* calls the 50-plus men and women the ***new age power.*** Marketers are beginning to recognize the huge consumer power of mature adults. Dychtwald says, "It's as though the American nation is giving birth to a "senior nation" and the 20th Century was the gestation period."[15]

Tapan Monroe, Futurist, prepared a *Trends Analysis* for the California Parks and Recreation Society (CPRS) in 1998 and he cited the increase in longevity to today's life span when 80% of Americans will live past age 65. The "boomer" generation started to turn 50 in 1996. The American Association of Retired Persons (AARP) will gain a prospective member every eight (8) seconds for the next 18 years. He views California seniors as an extremely influential group in shaping the future of recreation programs. They represent a large group that is generally financially secure, with free time and in remarkably good health. They represent a promising future for many park and recreation activities.[16] Flexibility, creativity and ingenuity will be needed in serving the new-old. While serving this group, service providers will still be addressing the needs of the old-old. The "one size fits all" approach to adult service delivery will not be successful.

The 1999, an AARP study[17] warned against labeling the baby boomer generation (1946-1964) as a homogeneous group. There are numerous segments within the group that have differing values, interests and experiences. Increasing diversity characterizes this group and there will be growing polarization among older Californians, and widening gaps in influence, education and income. The focus of this analysis is to highlight common characteristics and values that this group embodies that are pertinent to planning for the future needs of Milpitas' maturing population.

Increased Longevity

Increased longevity may be one of society's greatest accomplishments of the 20th Century. For Americans, average life expectancy in 1947 was 47. Today it is nearly 77.[18] People turning 50 today have about half of their adult lives ahead of them. The increased longevity impacts baby boomers in planning for their own longevity, but more immediately with regard to how

[15] Ken Dychtwald, ***Age Power: How the 21st Century will be Ruled by the New Old***, *Tracher/Putnam, 1999.*

[16] ***Trends Analysis for Parks and Recreation-2000 and Beyond***, Tapan Monroe, 1998.

[17] op. cit. ***Profile of Older Americans.***

[18] Ibid.

they handle their dual responsibilities of rearing their children and caring for their parents. AARP's ***In the Middle*** defines the *"Sandwich Generation"* as those between 45–55 years of age. 54% of this age group is most likely to have dependent children and aging parents.

The typical caregiver a woman 45-55 years old who works full time and spends 18 hours per week caring for her 77 year old mother.[19] This contribution of time is not trivial and can last for many years. However the AARP study found that boomers were more squeezed than stressed about handling their responsibilities. The survey found that boomers reported that family was the most important thing in their lives. More than two in ten members of the sandwich generation are helping to take care of their parents or other older adults. Seventeen percent provide personal assistance (which may include financial support) while 5% mainly provide financial support.[20]

This survey found that participation in caring for parents differs by ethnicity. Nineteen (19) per cent of whites provide such care, compared with 28% for African-Americans, 34% Hispanic Americans and 42% of Asian Americans. People born outside of the U.S. are much more likely to provide such care (43%) than those born in the U.S.[21]

These caregivers have a positive outlook about their ability to cope with their responsibilities and provide continuing care. Many welcome the opportunity to care for their loved ones. Those who report a higher degree of stress because they feel they are sandwiched are those of lower incomes, women, Asian and Hispanic Americans.

Members of the sandwich generation cope with care-giving in differing ways based on their race, ethnicity and income. Culturally sensitive mechanisms to assist caregiver families are needed. Respite and other caregiver support for the sandwich generation will be needed as life expectancy continues to increase and boomers move into the sandwich generation in even greater numbers.

Changing Role of California Women

California has seen dramatic changes in the way women live and work in the last half of the 20th Century. Through their investment in education, jobs and technology and their involvement in California's political process they have created new identities and roles for women. Women contribute about 40% of household income and attain most of the state's undergraduate degrees.[22] More women now work and run their own businesses. Women have increased their share of employment in executive, administrative and managerial occupations. California women are the fastest growing group using online services and are driving the growth of e-commerce.[23]

Driven by changes in their lifestyles, working women are pioneering ways to manage the complexities of work, home,

[19] ***In the Middle: A Report on Multicultural Boomers Coping with Family and Aging Issues.*** - AARP Research Report.

[20] Ibid.

[21] Ibid.

[22] ***Fault Lines in the Shifting Landscape***, Institute for the Future, November 1999.

[23] Ibid.

social life and elder care for parents by using communications and information technologies. These boomer women now beginning to age will not hold to the historic stereotype of the elderly. They will support aging creatively and will demand greater involvement in the decisions that affect their lives.

Economic Security

Aging trends have implications for community planning and service delivery, some of which are unexpected. One obvious implication is that a large group of individuals will have more free time on their hands. The demographic data presented in the previous section indicates that the elderly of the future will be better educated and have more income than previous generations. Net worth grew much faster for older retirees than younger ones. It increased a robust 36% for all 50+ Americans from 1983-1998. Yet for those 75+ it grew at 120% for the same time period.[24] Family income for 50+ grew 17 percent during the past two decades. In California average income for older persons increased at a faster rate than that of other age groups. The boomers' optimistic outlook based on the improvement in the economy over the past 20 years will affect their interests and their ability to pay for services.

The April 1999 issue of ***American Demographics*** featured changes in spending patterns among American households. One observation was the increase in spending from 1987-1997 by people ages 65 and older. Increased spending by this age group rose faster than any other age group in the sample. It is predicted that this trend in spending by better-educated, more affluent older Americans will only get bigger. These high achievers are technologically savvy, have access to information about the latest medical and social trends and are changing their lifestyles to maintain longer and healthier lives. An increasing number of older Californians are going online. As boomers age, this use will grow. They will drive the elder marketplace and policy agenda in the future. Older adults are also mobile. In 1997, the households traveling the most were those ages 45-54, 55-64 and 65-74 respectively. Entertainment is also in! Older Americans now spend more on entertainment than do people under 25.[25]

While the poverty rate of Americans over 62 years old has declined remarkably, the probability of being poor at some point in old age remains quite high. Gains in income and net worth have not been shared across the entire spectrum of the 50+ population. However, 50+ American population is characterized by a growing disparity between the rich and the poor. The escalating costs that define the health-care environment have a significant impact on one's ability to secure an economically viable retirement. The uncertainty of health insurance coverage casts a shadow over a generally improving picture of economic security for older Americans. Without protection against commonplace health expenses and long term care, virtually no one can be economically secure.[26]

Baby Boomers are Thinking about Retirement

"Boomers" or "Zoomers" are charging toward retirement at their own breakneck speed.[27] They have been reluctant to even think

[24] ***Beyond 50: A Report to the Nation on Economic Security***, AARP Research.

[25] ***American Demographics***, April 1999.

[26] Op. cit. ***Beyond 50*** AARP Research.

[27] *U.S News and World Report*, June 4, 2001.

about retirement, but by 1997 a Roper Reports survey indicates that 74% of this group had given serious consideration to retirement planning. However, new retirees and pre-retirees view retirement as more of a lifestyle transition than a termination of employment. Their attention to retirement reflects the fact that a hallmark trait of the baby boom generation is self-reliance. Again, Roper Reports trends substantiate the baby boomer's self-reliant approach, with 67% putting aside money for retirement.[28]

Self-reliance, independence, and indulgence are all lifelong traits that will lead to a uniquely boomer retirement.[29] Their lifestyle and choices in retirement may be very different than the depression era retirees, currently the largest group of elderly. Much as they transformed the suburbs they will rewrite what it means to be a senior citizen.[30] Here are some key findings from the AARP study.

- Baby boomers are twice as likely as older non-retirees to believe their desire to work is an obstacle to their retirement. This may be in part due to pre-retirees' reluctance to reconcile themselves to a life without work.
- Just two in ten (21%) of the boomers expect to move to a new geographic area when they retire.
- Almost one quarter (23%) expect to receive an inheritance that will affect their retirement planning.
- Only one third (35%) expect that they will have to scale back their lifestyle during retirement.
- Close to a half (49%) expect to devote more time to community service or volunteer activities during retirement.
- More than seven in ten boomers (73%) expect to have a hobby or special interest that they will dedicate a lot of time to when they retire.
- Family will play an important role in the baby boomer retirement; 57% expect to live near at least one of their children; 70% say they look forward to being a grandparent.

In general, boomers are optimistic about retirement but with some reservations about finances. Overall, the AARP study found few differences among baby boomers of various demographic sub groups. There were few significant differences in male or female boomers or race/ethnic sub groups. There are, however, major differences in views about retirement, which relate to varying income levels. The "have-nots" of this group are struggling to get by daily, never mind planning for retirement. This group is heavily dependent on the availability of Social Security. This group will have to work in their retirement years to support a comfortable lifestyle.

The Working Retirement

At the other end of the spectrum, are the optimistic and self-reliant boomers that will work because they want to. This shift to a "working retirement" is a baby boomer phenomenon. It may be the biggest legacy that they bring to the retirement of the new

[28] op. cit. ***Baby Boomers Envision Their Retirement.***

[29] Ibid.

[30] op. cit. ***U.S News.***

millennium. This impact brings opportunities and challenges for recreation planners, social service providers and employers.

Ken Dychtwald's ***Age Wave,*** 1989, discussed the transition from a Linear Life Plan to a Cyclic Life Plan. In the linear life plan the charting of our lives was straight and narrow--education, work, retirement (fishing or golf), and death. In the cyclic life plan the stages are more flexible, continuous and free of their traditional moorings.[31] The trend is "***rehirement not retirement***." Longer life expectancy will eliminate the rigid separation between age and the various activities of adult life. Retirement at 65 becomes obsolete as people live to be 90. The nature of work has changed; as such it is the "brains not the brawn" that counts. Learning and education, work or volunteer work and recreation will become lifelong activities. More Californians will work by choice.

The Santa Clara County COA Coming of Age Survey of 55+ adults found that 83.6% of survey respondents still in the work force would choose to work on a part time basis after the retirement, though not specifically because of economic necessity. Additionally, nearly 40% expect to work after retirement to generate sufficient income.[32]

Aging in Place

Older people want to stay at home or at least in a homelike situation as long as they can. The COA survey data indicated that 80% of Santa Clara County 55+ residents own their own homes. This is the highest proportion of home ownership of any Santa Clara County age group. It represents significant, though often hidden economic equity. Approximately half of the older adults surveyed reported that they had lived in their community for thirty years or more. When asked about their plans to continue living in their current community, fully 85% of the respondents indicated that they expected to live in their current community. These data demonstrate a strong connection between older adults and their communities. The desire to "age in place" will challenge policy makers as they strive for ways to support elders living in their own homes and communities.

About 150,000 Californians live in assisted living programs in the state.[33] The average age of the residents is 83. The trend toward assisted living is changing views of the full continuum of care. As more people live to be 85 and older, they will want to stay at home as long as possible and most people need something between their own home and a nursing home.

The demand for assisted living housing will grow, driven by those 75 and older. Most of the people will be a surviving spouse who is unable to shoulder the financial and physical burden of home ownership.[34]

The housing industry, policy makers and older adults will likely experiment to address housing and living needs. Shared housing, portable elder cottages in their children's backyards and home modifications to support elders staying at home will develop.

[31] ***Age Wave,*** Ken Dytchwald, 1989.

[32] op. cit. ***Coming of Age.***

[33] op. cit. ***Fault Lines.***

[34] ibid.

Aging is as much about place as time. The sheer size of the aging population will slowly see the conversion of many neighborhoods to elder friendly places. Neighborhoods are "naturally occurring retirement communities" (NORC's).[35] As communities begin to think differently about aging, they will learn to provide security, build social networks of support and keep long-term neighbors in place. A movement to in-fill housing for neighborhoods with space is likely. Designs and financing for senior housing in existing neighborhoods will occur. New communities will include design for elders as part of the mix.

> **Old age is the most unexpected of all things that happens to a man.** Leo Trotsky 1879-1940 ***Diary in Exile***

Lifelong Learners

As older adults view life cyclically, they have high expectations and interest in personal development and want to learn more to cope with changes in health and finances. In the first national survey[36] of its kind on learning preferences among Americans age 50 and older, researchers from AARP found that over half (57%) of the 1,019 respondents surveyed by telephone and online rejected the traditional four-walled teacher-classroom setting. Other findings are listed below.

- Older learners prefer methods that are easy to access, require small investment of time and money to get started.
- For most (90%) of those surveyed the best way to learn is through direct, hands-on experience.
- Newspapers, magazines, books and journals are most often the tools used for learning by 64% of age 50+ individuals.
- Older adults are interested in learning to keep up with what's going on in the world, for their own spiritual or personal growth, and/or for the simple joy of learning something new.
- Older learners are most interested in subjects that would improve the quality of their lives, build upon current skills or enable them to take better care of their health.
- One fourth of the respondents used the Internet to learn about educational travel opportunities.
- Almost one quarter (23%) of the respondents are willing to spend about $101 to learn something and nearly half (47%) are willing to spend up to $500 to do so.

The National Retired Teachers Association (NRTA) supported this AARP study. Their Executive Director, Annette Norsman, concludes that based on what was gathered from the survey, "educational institutions, businesses and marketers are going to have to offer experiences that are personally meaningful, offer hands-on learning, and enable adults to direct all aspects of the learning process and that are not too expensive."

The same would hold true for local government and non-profit organizations serving older adults. As the aging population emerges as better-educated and affluent than previous

[35] Ibid.

[36] AARP ***Survey on Lifelong Learning-2000***.

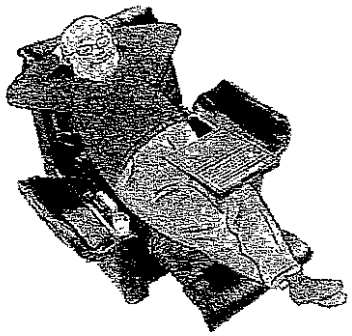
generations, the demand for learning opportunities in community settings will grow and the consumers are willing to pay for it.

The State of California Parks and Recreation Department 1997-Outdoor Recreation Survey identified two market segments of older adults related to outdoor recreation activities: lifelong learners and high risk seekers. Learning about nature, wildlife and visiting museums are pursuits of lifelong learning.

Their research also found that many people over 40 are starting to engage in activities such as kayaking, skydiving, and rock climbing. Recognizing the changes in the 55+ leisure travelers, **Elderhostel, Inc.** the international organization that offers travel and education experiences to adults 55 and over, added more adventure travel to their travel offerings. They also upgraded accommodations to attract the new-old customers, not content with the college dorm facilities used in the past.

Seniors Online

An increasing number of older Americans are online. A U.S. Census survey in August 2000 indicated that 24.3% of 65 and over households had a computer in the household and 17.7% had home Internet access. 56.9% of households 45-64 had a computer in the household and 17.7% had home Internet access. Asian and Pacific Islander households had the highest percentage of computers with 65% having a computer in the household. An AARP survey found that elders are using the computers to pursue personal interests, communicate with family and friends, widen their social circle and improve their quality of life. [37]



Computer users age 45 and over report having used computers for 8.5 years and spend an average of five hours per week using the Internet for e-mail and nine hours per week for other Internet activities.[38] Many venture online from the comfort of their recreational vehicles as they travel the country or stay in wired motels and elder hostels. As baby boomers head to retirement the use of computers and the Internet will increase. Working at home, shopping, financial planning, getting news and staying in touch with family and friends via e-mail are all popular uses of the Internet. Consumer education and training in computer use for older senior groups will help them keep pace with the technological changes surrounding them.

[37] op. cit. ***Fault Lines***.

[38] AARP ***Survey on E-Commerce, 2000***.

VII. Current Programs and Operation

Through its Recreation Services Division, the City of Milpitas provides an extensive offering of programs and services to older adults. Most of these take place at the Milpitas Senior Center. The mission statement for Recreation Services is: ***Recreation services is committed to providing programs and opportunities which enhance, expand and improve the quality of life for the citizens of Milpitas and its community.***

A Senior Advisory Commission has nine members, seven members are appointed by the City Council and two are voted in at a member-at-large election held at the Senior Center. Two alternate members are appointed by the City Council. The Commission meets monthly and works with the City staff in planning activities and events at the Senior Center.

The Senior Center, located at 160 N. Main Street, was built as a grammar school in 1915 and is a historic building on the National Register of Historic Places. It has served as a Senior Center since 1983 and was renovated by the City in 1994. The center is approximately 9,000 square feet. It is conveniently located on VTA bus route. On an annual basis, the Center has 600-850 registered participants and offers classes, trips, socials, a weekday lunch program and assistance with a variety of social services. Since not all adults officially register at the center, actual participation in programs and services offered by the City is much greater. Exhibit A lists all City programs and those programs where the City provides in-kind support or partial funding through CDBG funding. The programs are listed in the following categories.

- ***Health and Wellness Programs*** - Those programs that increase health and fitness and contribute to healthy living, independence and well being.
- ***Lifelong Learning*** - Classes and workshops that provide instruction in personal and professional development to enrich knowledge and develop new skills for leisure or work.
- ***Social Recreation Activities*** - Events and programs that are programmed or self-facilitated and offer social and personal enjoyment.
- ***Self-Help Services*** - Support groups, information and referral, assistance with daily tasks.
- ***Social Services*** - Services that assist frail and low-income adults with daily living activities and provide support to older adults and their caregivers.

The City directly provides and collaborates with others in delivering multi-faceted services and programs. Appendix B provides a **Service Inventory** of services currently available to older adults in Milpitas. The estimated monthly attendance in these programs is 9,127 persons. There may be some duplication is this count since one individual may participate in several activities in a month. A better measure of the level of participation is "service unit" delivered. On an annual basis, the City provides over 109,524 service units to its older adults. The Senior Center issues Activity

Cards for frequent users. There are currently 779 cards issued. 481 residents hold 62% of the cards and non-resident hold 298 cards. The highest level of participation occurs in the social recreation programs with health and wellness the second highest participation. The Chinese Evergreen Club has the highest level of participation of any group using the center.

Senior Center Operations

The City's General Fund supports the Senior Center operation and its programs as part of the Planning, Recreation and Neighborhood Services Department. The annual budget for the Senior Center and its programs is **$567,646**. The city also funds $63,163 for the County Senior Nutrition (Meals) Program as part of its partnership with the County of Santa Clara. In addition, the City provides $59,140 to programs sponsored by other community organizations that assist seniors. As Exhibit A shows, the City's total allocation for Senior Services and Facilities is **$819,931**. The City's Capital Improvement Program 2000-2005 also includes two projects for the Senior Center: Parking Lot Landscaping $75,000 and Senior Center Renovation $214,300.

Approximately 61% of the Senior Services Budget supports personnel costs. The budget includes seven (7) FTE positions.

- Senior Center Supervisor
- Office Assistant
- Public Services Assistant
- Nutrition Site Manager
- Case Manager
- Van Driver
- Recreation Aides (2)
- Food Server
- Building Attendant

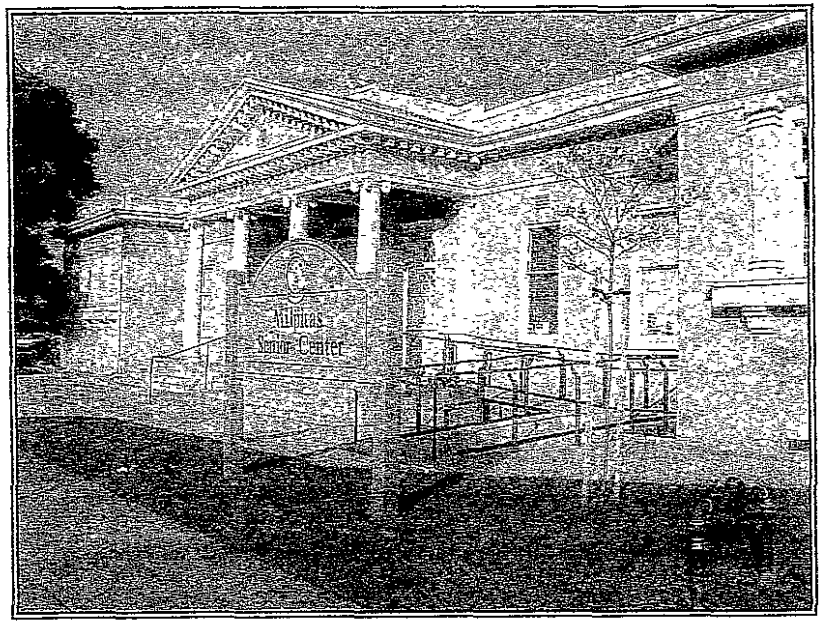
Another two (2) FTE positions provide custodial services through the City's Community Services - Facilities Division and four (4) part time positions are available for custodial work.

Exhibit A - City of Milpitas Funding for Senior Services

Program	City Funding
Senior Center Programs/Services	$567,646
County Senior Nutrition Meals Program	*$63,163*
Senior Center Building Maintenance Janitorial (Community Services Dept.)	$129,982
Paratransit (VTA Outreach)	$28,700
CDBG Funds Live Oak Adult Day Services	$5,120
CDBG Second Harvest Food Bank	$5,000
CDBG-Indo-American Community Services	$5,300
CDBG Funds Project Match	$5,020
CDBG Funds Legal Assistance	$5,000
CDBG Funds Long Term Care	$5,000
Total Funds	**$819,931**
CDBG-Community Development Block Grant	

The Center's regular operating hours are Monday through Friday 9:00 a.m. to 4:00 p.m. Some programs and activities are scheduled in the evening hours and on weekends. The center is also used for other recreation programs and is rented to community organizations and private groups for activities and

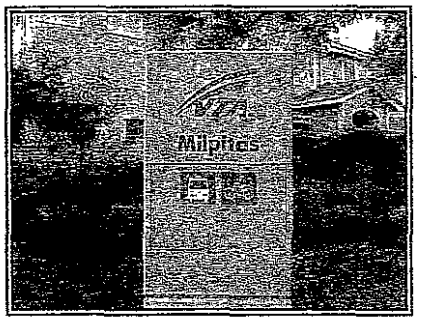
events. The center is a busy place particularly during the daytime hours. Evening hours are often booked for recreation classes that serve all age groups These programs include: aerobics, Rainbow programs, hip-hop dance, song-leading, belly dance, crafts and karate.



If all five rooms of the Senior Center were available seven days a week from 9:00 a.m. to 9:00 p.m. there would be 420 hours of room capacity available for use each week. Using a sample time period (May 2001) of use at the Senior Center, it was found that there are approximately 220 unused room hours available each week. This is 52% of the total capacity. Appendix C displays a sample month of the hours available (not booked) at the Center. Time for setting up and clearing the rooms was factored in and not counted as available. Most of the available hours are evenings and weekends. This is not the peak demand time for the current users. There is not a lot of down time at the Center during the daytime hours. The dance room and art room have the most capacity available for additional scheduling during the daytime hours. There is however, capacity available to offer programs in the evening and on weekends to serve working adults. Operating hours and staff scheduling would have to be adjusted to meet this opportunity. Relocating non-senior activities to other sites could provide additional hours for senior activities. Currently, most of the non-senior activities are in the afternoon, evenings and weekends. The weekend activities are often rentals and relocating them, if feasible, would impact revenue generated from the Senior Center. Restricting use to only senior users is a policy decision the City would need to address to provide additional hours for senior activities.

> May your heart always be joyful,
> May your song always be sung,
> May you stay forever young,
> Forever young, forever young. - Bob Dylan 1974

Transportation Services



Public transportation is provided to Milpitas residents through Valley Transportation Authority (VTA). Bay Area Rapid Transit (BART) provides mass transit throughout the Bay Area. The nearest station for BART is located in Fremont.

- VTA bus service express and local is provided on numerous routes throughout the City from 5:00 a.m. to 11:00 p.m. on week days and 7:00a.m to 10:00 p.m. on weekends and holidays. Seniors can purchase monthly bus passes for $9.00. Single ride fares for seniors are $.40.

- Light rail service is currently available through the I-880/Milpitas Light Rail Station. The service is operated by VTA. Two other stations Great Mall and Montague will open in 2004 extending rail service East to Capitol Avenue. The opening of the Great Mall Station will bring light rail to Midtown and offer convenient access to commercial and residential areas. Several affordable housing developments are located in this area. The VTA Bus Route 66 will offer connecting service to the Great Mall Station.

- A future BART station is planned for Milpitas as part of a proposed, multi-modal transportation center at Montague Expressway and Capitol Avenue. The Major Investment Study is complete and the Environmental Impact Review (EIR) underway. The project completion date for this project is 2014.

- Paratransit service is provided through the VTA Outreach program. This service is provided for those residents who are unable to use the public transit. This is a dial-a-ride service with door-to-door pick up and drop-off. A 24-hour advance reservation is required. Eligibility for the programs is through an application process with VTA. Outreach is available to those persons whose temporary or permanent disabilities prevent their independent use of public transportation. Applicants must demonstrate that because of their disability they are unable to use VTA's bus or light rail services for one or more of the following reasons:

  - Unable to independently ride a bus or light rail vehicle.
  - Unable to get on or off a bus or light rail vehicle.
  - Unable to get to or from a bus stop or light rail station platform.

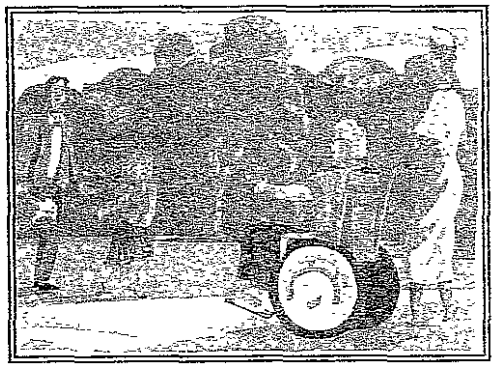
  Many seniors are users of this service. The City provides $28,700 for paratransit subsidy for residents. The City subsidy per ride is $1.70, each rider pays $.80 at fare box. In 2001, Outreach provided **15,248** rides to Milpitas residents in this program; approximately 1,400 rides a month. This is 2.24% of the monthly Outreach ridership. Rides are provided to any destination in the County and to the Fremont BART station.

- The Senior Center Shuttle is operated by the City and takes seniors to and from the Senior Center meals program, Monday-Friday. Approximately 387 seniors a month use this service.

- The Senior Center provides transit information and sells passes daily at the Center. Approximately 28 BART passes and 160 VTA passes are sold monthly.

The Senior Center is well located for public transit use. It is on the VTA local bus route that connects to the Light Rail Stations. During the public input process the transportation issue raised most frequently was the lack of on-time response by Outreach services.

Housing and Adult Day Care Services



Adult day care and housing related service providers in Milpitas and San Jose were contacted via telephone to gather information and data regarding the Milpitas residents' use of their services. A detailed rental housing needs analysis is presented in Chapter X.

- **Adult Day Care Services** - Live Oak Adult Day Care Services, based in the City of San Jose, provides specialized adult day care for frail and dependent at-risk seniors, respite for family caregivers, and breakfast, hot lunch, and snack meals. The Live Oak program enriches the quality of life of disabled seniors by providing recreation, opportunities for socialization and peer companionship, and nutritious meals, with a goal of preventing or delaying the institutionalization of these seniors. Seniors served are almost exclusively (95%) those with very low and lower income levels.

During the past year 357 frail and dependent at-risk senior residents have used Live Oak services; ten of them (3%) were residents of Milpitas. Live Oak reported no Milpitas residents on their waiting list. Earlier this year, Live Oak obtained a grant from the City of Milpitas to provide seed funds to develop and implement an adult day care program in the City of Milpitas.

Table 10 on the following page illustrates information received from a sample of ten senior services providers who were responsive to our requests for information and data on their programs. Providers included in this inventory include those who offer specialized adult day care for frail and dependent at-risk seniors. Although this is not a complete list of such providers, the data serve as insight to actual use patterns of Milpitas seniors for such services.

As Table 10 reveals, in aggregate, the ten providers reported having served more than 1,200 seniors during the past year, 81 of whom (6.8%) reside in Milpitas. While these data cannot be viewed as a precise estimate of need for such services, it does demonstrate a Milpitas' resident's reliance on the San Jose Alzheimer's Activity Center.

Table 10 - Adult Day Care Services

Adult Day Care Services Milpitas Market Area					
Program Description	**City**	**Residents Served in Past Year**		**Waiting List**	
		Total	Milpitas	Total	Milpitas
Alzheimer's Activity Center	SJ	150	45	0	0
Community Day Program	F	51	4	0	0
Creativity Unlimited-Dequisto	SJ	50	3	0	0
Daybreak/Catholic Charities	SJ	65	1	5	0
Evergreen Valley Adult Day	SJ	27	0	0	0
Hope Rehabilitation Services	SJ	200	15	20	2
Live Oak Adult Day Services	SJ	357	10	0	0
MACSA Adult Day Care Ctr.	SJ	100	0	0	0
San Jose Day Respite Program	SJ	200+	3	0	0
Yu-Ai Kai Senior Day Service	SJ	44	0	0	0
	Total	1,244+	81	25	2
Source: Research Network Ltd., 11/2001 SJ= San Jose F–Fremont					

- **Project Match** - located in San Jose, provides senior affordable housing referrals and assists seniors in maintaining ownership of their homes through support services including shared housing, in-home services and case management. Elderly, low-income households are a major priority for Project Match. The Milpitas Senior Center makes referrals to this program.

- **Landlord/Tenant Mediation Services** - City of Milpitas offers tenant/landlord mediation services limited to rent increases and service reductions in Milpitas Mobile Home Parks.

- **Homeless Shelter Services** - The Emergency Housing Consortium offers shelter services for those in need of temporary housing. During the July 1, 2000 to March 31, 2001 time frame (nine months), Emergency Housing Consortium provided shelter services to 42 Milpitas residents, 7 of whom were aged 50 and over (16.7%). Four users were aged 56 to 64 years and none were over 64 years.

Marketing and Outreach Programs

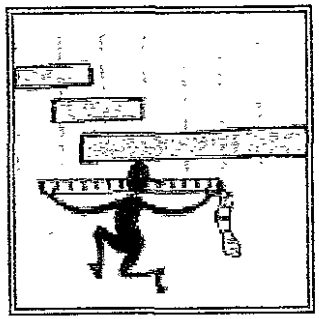
The City and its partners utilize traditional media and public relations resources to disseminate public information as well as educational materials about City services for older adults. These resources include the following.

- Ads, press releases and articles in the Milpitas Post and San Jose Mercury News.
- Cable TV (Channel 15)
- City's Website
- Monthly Senior Newsletter distributed to Senior Center members, mobile home parks, Terrace Gardens and City facilities
- Milpitas Connection Magazine
- Brochures, flyers and posters at strategic locations
- Local radio stations PSA
- Direct mailing to Senior Center members
- Bus shelter advertising

Some materials are translated into different languages but the practice is not consistent for all programs. The City also provides case management services at the Senior Center. This service is available each morning, Monday through Friday at the Senior Center and is effective at linking needy elderly persons with social services and providing the assistance needed to apply for services.

Benchmark Survey of Comparable Cities

As part of the Needs Assessment a benchmark survey of senior services offered by comparable cities was conducted. This was done to compare Milpitas' budget, services and performance with comparable cities. The six cities included in the survey were Fremont, Mountain View, Palo Alto, San Jose, Santa Clara and Sunnyvale. The survey questions focused on services related to recreation and community services typically offered at a Senior Center, transportation services and housing for seniors.



No two cities are exactly alike in how they operate and deliver services. Cities also use different funding methods to provide services; therefore there are no absolute measures of efficiency or productivity. The survey questionnaire and the complete data tabulation of the Benchmark Survey are included in the Appendix. A summary of pertinent data, Exhibit B, is presented on the following page. The data was collected through a written questionnaire completed by each City representative. Follow up phone calls were made to clarify and confirm some of the data received. The inherent weakness in this methodology is the reliance on the data received from the source. Nonetheless, the comparison does provide insight into how Milpitas compares to the five cities. Following this survey City staff conducted an additional survey to determine if typical senior services were offered directly by the cities or provided through other agencies. The results of this survey are included in Appendix J.

Milpitas compares favorably with the other cities in the variety of services and the level of financial support provided by the City to deliver these services. Some key findings follow.

- Milpitas has the lowest 55+ population, with 15% of the total City population or 9,136 persons as compared to Palo Alto the highest, with 26% of its population 55+.

- Milpitas' budget for Senior Services is .54% of the City's total operating budget. Fremont is higher at .83%. San Jose senior services budget is .07% of the City's total operating budget.

- The cities are comparable in the variety and type of services offered. However two cities, Palo Alto and Mountain View offer many of their service through other organizations. Milpitas, San Jose, Santa Clara and Sunnyvale directly offer most of their services. Milpitas stands out for directly providing and funding full time case management services and supports additional ethnic and vegetarian meal programs.

- Palo Alto is the only City that contracts for its Senior Services and Center operation. The City has an operating agreement and lease with Avenidas, a non-profit organization to operate programs and services for seniors. As a result the City has no FTE positions dedicated to senior services and has the lowest operating budget expense of the comparable cities.

- All the cities participate in the development of senior housing mainly through partial funding. Milpitas is the only City to fully fund a senior housing development.

All the Santa Clara County cities in the survey utilize the Outreach transportation service provided by Valley Transportation Authority (VTA). Milpitas has the second highest level of subsidy at $1.70 per ride and accounts for approximately 2.2% of the countywide outreach ridership. The City of San José spends $46,000 for Outreach for a subsidy of $.35, per ride, much less than Milpitas.

- Milpitas is providing a higher level of subsidy, which lowers the out-of-pocket cost for the seniors using this service. Palo Alto and Mountain View cover the entire cost for the ride at $2.50.

- Palo Alto is the only City in the survey group that offers a cross-town shuttle that includes residential areas and senior housing sites in its routes.

Exhibit B - Benchmark Survey Summary

Benchmark Factors	Milpitas	Fremont	Mountain View	Palo Alto	San Jose	Santa Clara	Sunnyvale
Population Total	***62,698***	***203,413***	***70,708***	***58,598***	***894,943***	***102,361***	***131,760***
Population 55 +	9,136	32,553	12,542	14,956	141,793	18,434	24,494
% of 55 +	0 15	0 16	0.18	0.26	0.16	0.18	0.19
City Operating Budget	$105,331,006	$120,500,000	$176,706,717	$125,766,000	$1,501,141,144	$365,534,066	$214,867,460
Operating Budget-Senior Services	$567,646	$1,000,000	$224,479	$440,300	$1,000,000	$520,451	$515,000
% of Total City Budget	0.54%	0.83%	0.13%	0.35%	0.07%	0.14%	0.24%
Cost per Capita	$9.05	$4.92	$3.17	$7.51	$1.12	$5.08	$3.91
Cost per Capita 55+	$62.13	$30.72	$17.90	$29.44	$7.05	$28.23	$21.03
Number of FTE* Senior Services Staff	7.00	21 00	2.50	<1	50.00	6.00	5.00
Residents 55+ per FTE	1,305.14	1,550.14	5,016.80	N/A	2,835.86	3,072.33	4,898.80
Square Footage - Dedicated Space for Seniors	9.000	28,000	25,000	17,800	150,000	18,000	23,000
Square Footage per Capita 55+	1	0.86	1.99	1.19	1.06	1	0.94
Existing Senior Housing Units	234	250	595	489	1954	480	57
Units per Capita 55+	0.026	0.008	0.047	0.033	0.014	0.026	0.002
Avg.# of one-way paratransit rides per month	1,496	>800	400	2,816	36,810	5,851	3,724
City subsidy per ride	$1.70	N/A	$2.50	$2.50	$0.35	$1.20	$1.10

Source:Harison & Associates
* FTE - Full Time Equivalent
Palo Alto has an operating agreement with Avenidas and provides funding for programs and leases the Senior Center to Avenidas through a long-term lease.

Chart 2 - Operating Cost per Capita

With a 55+ population of 9,136, Milpitas has the highest cost per capita for its operating budget for Senior Services with a cost of $62.13 for each 55+ resident. The lowest cost per capita was $7.05 for the City of San Jose. Milpitas' cost per capita is higher because it has fewer residents to spread the basic costs of operating the Senior Center and its programs. The City also provides some services that other city's do not. Appendix J compares Milpitas services with other cities. The City directly provides special meals/nutrition programs, health and wellness and case management and family support not provided by all the other cities. The City's willingness to support a comprehensive senior program demonstrates a strong commitment on the City's part to fund Senior Services at a high level.

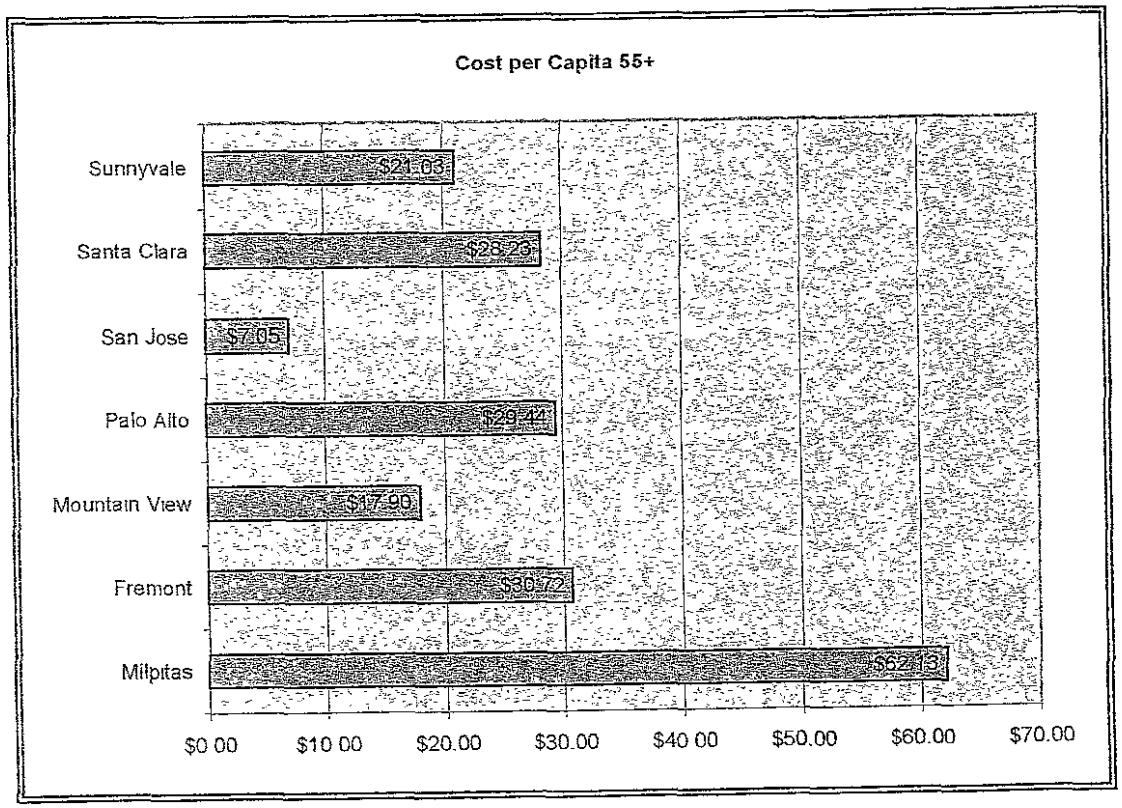


Chart 3 - Residents 55+ per Employee

A measure of efficiency is the productivity of labor. The productivity can be measured by comparing the number of employees required to deliver a service. The measurable unit in this case is a resident 55+. Milpitas has seven (7) Full Time Equivalent (FTE) positions, which provides one (1) employee for every 1,305 persons. Mountain View has 2.5 FTE and provides one (1) employee for every 5,017 persons. Milpitas funds a full time Case Manager and additional nutrition program support staff that increases its FTE positions. These findings reveal that Milpitas residents are receiving a higher level of service than other cities. Palo Alto contracts with a non-profit organization to provide services and thus has no dedicated FTE positions for Senior Services.

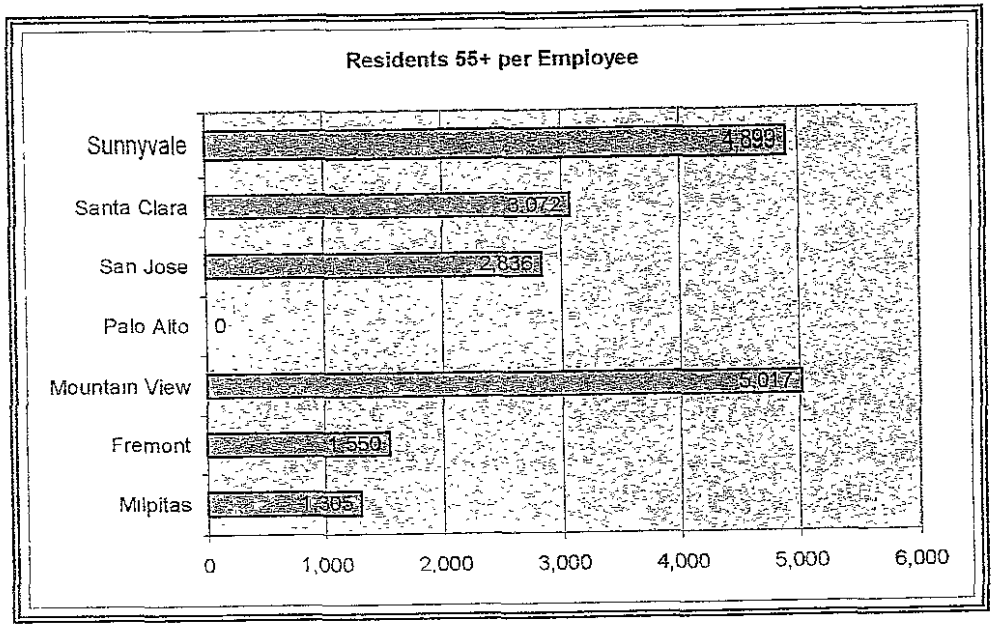


Chart 4 - Senior Center Square Feet per Capita

The six comparable cities were asked to respond with a square footage that was dedicated to senior use. A standard Senior Center per National Recreation and Park Association (NRPA) guideline is 10,000 square feet. Milpitas is at the median range with one (1) square foot per resident 55+. In practice, other age groups use senior centers for community events and programs. Most cities also use other community facilities for senior programs and activities. Milpitas is currently providing space that is comparable to other cities. Mountain View is providing the most square footage with 1.99 square foot per capita 55+ resident.

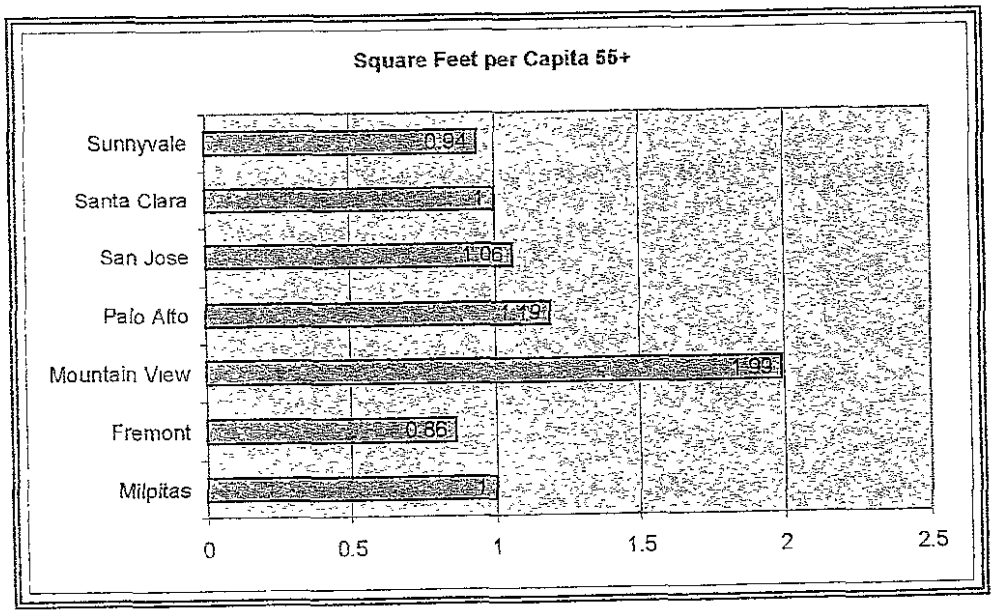
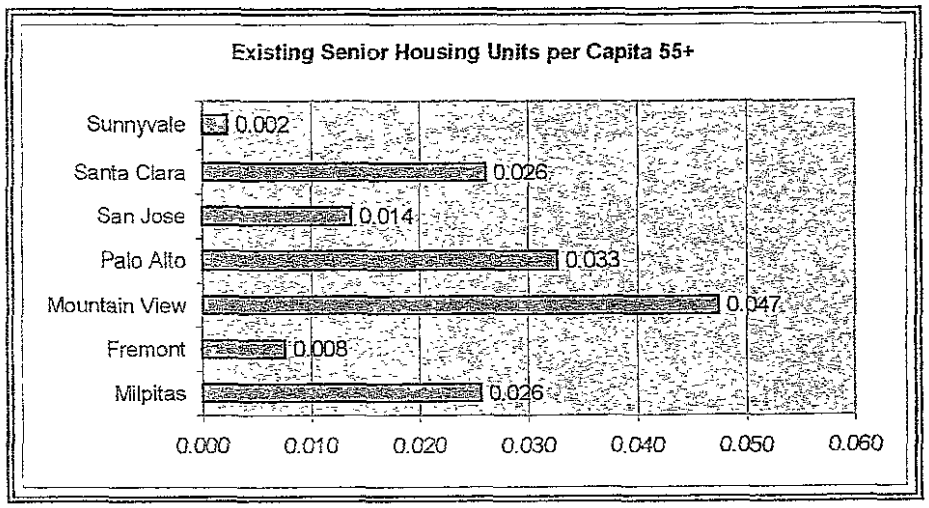


Chart 5 - Senior Housing Units per Capita 55+

Milpitas has 234 existing senior housing units. This places Milpitas behind Palo Alto and Mountain View in housing units per capita, with .026% senior housing units/55+ resident.



In the years ahead quality, accessible assisted living settings will become a central source of care for elderly Americans.
–National Center for Assisted Living

VIII. Needs Analysis

This Needs Analysis has been prepared to serve as a basis for determining any changes needed in the direction and scope of senior services provided by the City of Milpitas. Most of the services are provided at the Milpitas Senior Center. However, adult day care, housing and transportation needs will also be addressed. The analysis seeks to achieve the following goals:

- Provide a comprehensive overview of the current and projected needs for senior services.
- Provide a means for understanding those needs in terms of physical space that may be required.
- Recommend a physical response, if needed to address those needs.
- Evaluate service delivery options for meeting needs.

The methodology to ascertain the senior needs included the following research and review of existing needs surveys and the following community processes to solicit input on the needs and priorities.

- Stakeholder Focus Group
- Written Questionnaires from Focus Group members
- Community Workshop
- Interviews of Service Providers of Senior Services
- Interviews of City Council Members
- Benchmark Survey of Comparable Cities

The detailed comments and notes from these sessions are included in the Appendix. The input from this process provided information on the City's current performance by asking community members what they saw as the City's strengths and challenges in meeting the needs of older adults. The general consensus of those participating in the process revealed that the City officials generally care about seniors and have invested in both services and facilities to meet their needs. The City's **strengths** in serving older adults include the following.

- Senior needs are a priority and the City is responsive in addressing those needs.
- The Senior Center is a good location and provides a variety of valuable services.
- The meals/nutrition program is positive.
- Terrace Gardens housing is beneficial.

Participants in the community process were asked what challenges the City faced in delivering services. The key **challenges** identified included physical and service constraints.

- Affordable housing for independent living
- Delivering services to a multi-cultural, older population
- Overcoming communication barriers to understand and address the needs of multi-lingual
- Physical constraints of space and age of existing facilities
- Transportation from residential areas to the Senior Center and other locations
- Caregiver support and adult day care
- Health education and access to care

The needs expressed through the community process reflect those identified in the 1994 COA Report, Coming of Age [39] that reported the following as essential needs for seniors.

- Senior housing
- Affordable health care
- Public information on senior programs and services
- Respite for caregivers
- Translation services for non-English speakers

Exhibit C lists all the service needs identified during the community input process and the interviews. These items have been translated directly from input in those meetings and interviews and are intended to represent rough program/service requests. Presenting these program components in this way maintains an audit trail throughout the ongoing analysis and any subsequent program or facility changes or new designs.

This approach recognizes that public input usually brings out requests focused on service improvement. Participants assume current services will continue. Additional components may be identified later in the analysis reflecting input from facility staff, consultants and others. Opportunities and limitations will also become apparent as the analysis proceeds and needs are matched against available and any future facilities.

This listing is useful as a cross reference to the Benchmark Survey of Senior Services offered by other cities (Appendix J). The cross reference demonstrates Milpitas strengths in many service areas and indicates some deficiencies the City will have address in meeting future needs. A few services not directly offered by the City of Milpitas but offered by some of the other cities are:

- Computer training and Internet access
- Adult Day Care and caregiver support
- Evening and weekend programs and services

This list includes performance items as well as physical items. **Performance items** represent requirements for a particular character, relationship or spatial quality regarding any aspect of facility utilization. **Physical items** represent actual spaces, physical constructs or other functional planning needs.
In understanding facility needs it is important to differentiate between needs that require a Physical Response and those that require an Organizational Response.

Physical Responses include the designation of actual space to satisfy a need. This may include existing space or proposed space. It may also include portions of a space such as an office alcove, counter space or specific storage components.

Organizational Response includes those initiated by management and administrative staff. These may include the creation of programs, the addition of staff or the initiation of relationships with other agencies. Typically these do not require a Physical Component and are affected largely by staff availability and funding resources.

In some cases an Organizational Response may trigger the need for a Physical Response. Examples include the creation of a program that may require dedicated office space or equipment

[39] Op. cit. COA ***Coming of Age***

Exhibit C - Service Requests

Component	Physical Response	Organization with Physical Change	Organizational Only	Remarks
Adult Day Care/Respite		■		Organizational commitment to provide this service prior to space allocation or facility.
Change image of Sr. Center to attract young-old		■		Not specific to any one need. Could require physical change if programs require more space.
Access to Internet/Computers		■		Organizational commitment that could require space and equipment.
Computer class instruction		■		Organizational commitment that could require space and equipment.
On site cooking (Commercial Kitchen)	■			Requires dedicated space and equipment.
More meals (Breakfast and Dinner)		■		Organizational commitment prior physical response or space allocation.
Meetings between social workers, community and seniors			■	Organizational commitment only incidental physical response.
Senior Center user-friendly			■	Service commitment; only incidental physical response.
Translation services for non-English speaking			■	Service commitment; only incidental physical response.
Counseling/support groups		■		Organizational commitment prior physical response or space allocation.
Multi-cultural training			■	*Organizational commitment; only incidental physical* response.
Prescreening for those taking free programs			■	Organizational commitment; only incidental physical response.
Outdoor games	■			Requires dedicated space and equipment.
Lifelong learning (classes and workshops)	■			Requires classroom space may be shared with other uses.
Communication and outreach			■	Service commitment; only incidental physical response.
Intergenerational Activity		■		Organizational commitment that could require space and equipment.
Satellite programs		■		Organizational commitment that could require space and *equipment.*
Evening/weekend activities			■	Organizational commitment; only incidental physical response. Use existing facilities.
Caregivers support and service		■		Organizational commitment that could require space and

Component	Physical Response	Organization with Physical Change	Organizational Only	Remarks
				equipment.
Excursions/trips			■	Organizational commitment; only incidental physical response.
Active programs (Fitness, Aerobics, Weight Training)	■			Requires dedicated space and equipment may be shared.
Swimming	■			Requires dedicated space and equipment may be shared.
Multi-cultural meals programs		■		Organizational commitment prior to space allocation.
Volunteerism			■	Organizational commitment; only incidental physical response.
Financial planning/legal assistance counseling		■		Organizational commitment that could require space and equipment.
Health education		■		Organizational commitment that could require space and equipment.
Marketing to working seniors			■	No specific physical response.
Health clinics		■		Requires organizational commitment prior to space allocation.
Improve access ramp	■			Requires physical modification.
Non-institutional ambiance at Center		■		Could require building modifications.
Energy efficient facilities		■		Organizational commitment to improve energy efficiency and make modifications.
Bilingual instruction in ESL		■		Requires organizational commitment prior to space allocation.
Tutoring in ESL		■		Requires organizational commitment prior to space allocation.
Home repair assistance			■	Organizational commitment only incidental physical response.
Case management			■	Requires organizational commitment prior to space allocation.
Juice/coffee Bar	■			Requires dedicated space and equipment.
Art and crafts classes	■			Requires dedicated space and equipment.
Citizenship and history Classes (bilingual)	■			Requires classroom space could be shared with other uses.
After school care for youth		■		Requires organizational commitment prior to space allocation.
Family activities		■		Requires organizational commitment prior to space allocation.
Cooperative programs with other			■	Organizational commitment could result in shared use of

Component	Physical Response	Organization with Physical Change	Organizational Only	Remarks
organizations				facilities.
Adult sports leagues for 55+		■		Requires organizational commitment and related facilities that could be shared.
Band and choral group singing	■			Requires dedicated space and equipment.
Stage for performances/drama	■			Requires dedicated space and equipment.
Social gathering/dances	■			Requires dedicated space and equipment.
Cooperative marketing and promotion of senior programs			■	Requires organizational commitment prior to space allocation.
Access to health care services and facilities			■	Organizational commitment to facilitate users understanding of health care services and transportation to same.
Mental health services		■		Requires organizational commitment for this service prior to space allocation.
Serving home-bound - assistance with shopping, laundry, housekeeping for frail elderly			■	Organizational commitment and coordination with other agencies- only incidental physical response.
Transportation to public transit stops		■		Requires organizational commitment for this service - staff, vehicles and equipment.
Escort service for seniors to medical, shopping etc.		■		Requires organizational commitment for this service - staff, vehicles and equipment.
Shuttle service from homes to Senior Center and other services		■		Requires organizational commitment for this service- staff, vehicles and equipment.
Affordable senior housing for independent living, in convenient location with meals, shuttle service, laundry, parking etc.		■		Requires organizational commitment to develop housing with private sector and could require physical response dedication of land or facilities.
Assisted living -senior housing		■		
Long term care facilities		■		
Source: Harison & Associates, 2001				

Areas of Greatest Need

The City is effective in addressing many of the current needs of its older adult population. However, simply the growth in the older adult age group, as presented in the Demographics Analysis, will increase needs and demands for services. The most **immediate** needs based on community input and the research and analyses completed are summarized here.

Adult Day Care - Of particular note is the increase in the population 85 years and over. Many of these are elderly women living alone, who need assistance from their families and public service agencies. The concerns voiced by the local agencies interviewed and the community members participating in the public process identified gaps in service locally, for adult day care, care giving support and housing. Currently 81 residents use services in San Jose and Fremont to meet their needs for adult care. Milpitas residents make up nearly one-third of the users of the Alzheimer's Center in San Jose. Coupled with the need for adult day care is the need for support for caregivers and their families.

Rental Housing - Although many adults 55+ in the City, currently own and live in their own homes, as they age this may become more difficult. They will seek other alternatives such as rental housing, assisted living or move in with their children. The COA survey discussed previously, found Santa Clara County residents prefer to stay living in their current communities. Elders prefer to age in place and this will challenge cities to develop housing alternatives to single-family home ownership. The Housing Analysis in Chapter X provides a detailed analysis and forecasts housing needs.

ESL Instruction and Translation Services - Milpitas is a City with many cultures and is challenged to accommodate those who do not speak English. Non-English speaking older adults face many challenges in trying to secure needed services. This has created a need for public information that they can access and understand, translation services and ESL instruction and tutoring.

Computer Access and Training - As the number of older adults online increases, the need for Internet access and computer skills increases. The current seniors are eager for computer training in a non-threatening setting to facilitate their learning. This need will drop off as the tech-savvy boomers, who have these skills, age.

As the baby boomers age, their sheer numbers will drive the need for a variety of services and space to house those services. By 2010 there will be 14,400 adults over 55 in Milpitas. This gives the City some time to plan for these future needs. The boomers are known for their self-reliance, independence and indulgence and will not want to sacrifice their lifestyles. This is why many will continue to work in retirement. Based on current research and trends, it is expected their demands for programs and services will center on those that will foster healthy, active and exciting lifestyles. The City and other local agencies currently offer many of these programs. Improvement and expansion of services in the following areas are viewed, as the likely **future** needs.

- Health and Wellness Programs and Health Education
- Lifelong Learning
- Outdoor Recreation Adventure and Travel

The boomers will seek programs that are at convenient times and easily accessible locations. This may require a change in the type

of facilities and the times that programs are offered. The following chapter analyzes the City's current facility capacity.

When I am older losing my hair,
Many years from now.
Will you still be sending me a Valentine
Birthday greetings bottle of wine.
If I'd been out till a quarter to three
Would you lock the door.
Will you still need me will you still feed me,
When I'm sixty-four. - Beatles

IX. Facility Analysis

In the following Exhibit D, the Program Components requiring a physical response, including those triggered by needs for an organizational response, are differentiated between physical response and characteristic response. All components that merely require an organizational change are removed from this listing. Program components that relate to transportation needs and housing needs will be dealt with in other sections of this report.

A **physical response** responds to a particular functional need that requires specific facilities. Physical response is further differentiated and categorized based on the need for dedicated facility/space or shared facility/space.

- **Dedicated Facilities** respond to uses and functional needs that cannot logically be shared with other uses. Such facilities may include specific equipment or interior components that dominate the space and define its use, precluding the sharing of the space. Examples would be kitchens and food service facilities, and exercise rooms with equipment that cannot be easily moved. Dedicated does not mean that the facility is only for one age group.

- **Shared Facilities** can be used for a range of needs and users. The components of these spaces are less specific and offer flexibility to staff scheduling the facilities. Examples are multi-purpose rooms and classrooms.

A **characteristic response** is a general response to needs that may occur over a wide range of uses. This type of response is generally met through good design that recognizes the specific needs of users. Examples would be good lighting for security, convenient parking and access.

Options available to the City to address the need components are presented. It may not be possible or appropriate to address all the needs through one single purpose-facility. Facilities that serve older adults in the future need to be flexible, inviting and ergonomically designed with older adults in mind.

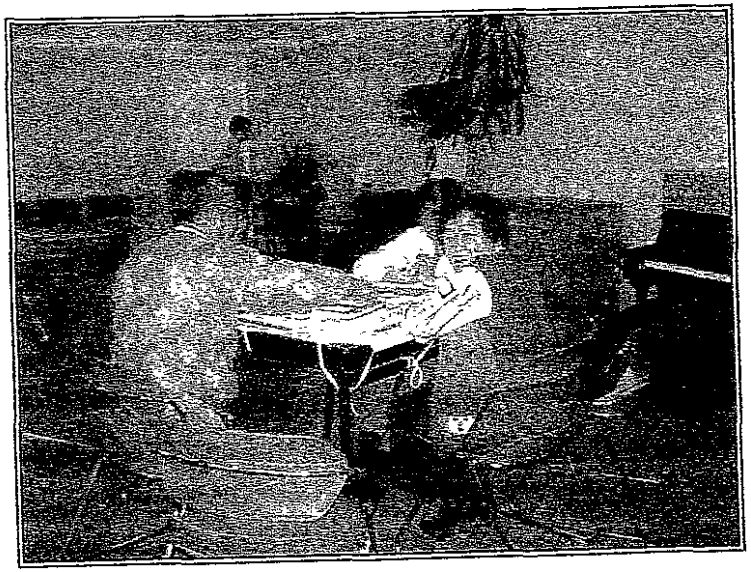


Exhibit D - Facility Analysis

Component	Dedicated Facility	Shared Facility	Characteristic	Options
Adult Day Care/Respite	■			Requires dedicated space that meets state requirements. City is considering partnership with Live Oak Day-Care.
Change image of Sr. Center to attract young-old			■	Not specific to any one need. Create an ambiance, through programming and design that attracts young-old. Could require physical change if programs require more space.
Access to Internet/computers		■		Internet access can occur wherever workstations exist. Workstations may be part of a large meeting room or lobby. Access to staff for support and instruction is beneficial. There are several City facilities that could be equipped to meet this need: Library, Community Center and Senior Center.
Computer class instruction		■		Instructional programs need to be held in classrooms with computer workstations. These can be shared facilities and used for other classes as well.
On site cooking (Commercial Kitchen)	■			Requires dedicated space and equipment.
More meals (Breakfast and Dinner)		■		Multi-purpose rooms with kitchen facilities needed.
Senior Center user-friendly			■	Service commitment on part of staff. Incidental physical *response might include good lighting, sound system, access* ramps.
Counseling/support groups		■		Organizational commitment to provide space required. Simple conference or meeting rooms can meet this need. Collaboration with health associations to facilitate meetings is advised.
Outdoor games	■			Requires dedicated area of land for games such as shuffleboard, horseshoes, bocce ball and equipment. Adjacency to a park or other recreational facility is desirable.
Lifelong learning (classes and workshops)		■		Requires classroom space; may be shared with other uses.
Intergenerational activity		■		Organizational commitment required before determining the type of facility needed. Several facilities could provide needed space: schools, parks, sports center, library and community center.
Satellite programs		■		Organizational commitment required that could require space and equipment. Several facilities could provide space: schools, parks, sports center, library and community center.

Component	Dedicated Facility	Shared Facility	Characteristic	Options
Evening/ weekend activities		■		Organizational commitment required can use existing facilities including Senior Center, community center, and sports center.
Caregivers support and service		■		Organizational commitment required. Meeting rooms and counseling rooms could meet space needs.
Active programs (Fitness, Aerobics, Weight Training)	■	■		Some activities require dedicated space such as weight rooms. Open gym or exercise areas can be used for a variety of activities.
Swimming	■			Requires dedicated space and equipment may be shared.
Multi-ultural meals programs		■		Organizational commitment required could use existing facilities.
Financial planning/legal assistance counseling		■		Organizational commitment required - counseling rooms and meeting rooms that can be shared with other uses.
Health education		■		Organizational commitment required to determine space needs, most likely classrooms.
Health clinics	■			Requires organizational commitment prior to space allocation. Could require special facilities.
Improve access ramp			■	Requires physical modification to meet building codes.
Non-institutional ambiance at Center			■	Not specific to any one need. Create a non-institutional ambiance through programming and design. Could require building modifications is required.
Energy efficient facilities			■	Responds to need to conserve energy. Organizational commitment to improve energy efficiency and make modifications.
Bilingual instruction in ESL		■		Requires organizational commitment to expand programs prior to space allocation.
Tutoring in ESL		■		Requires organizational commitment prior to space allocation.
Home repair assistance		■		Organizational commitment; space requirements are minimal office space.
Case management		■		Requires organizational commitment. Space requirements are minimal office and counseling area.
Juice/coffee Bar	■			Requires dedicated space and equipment.
Art and crafts Classes	■	■		Requires dedicated space and equipment particularly if there are long term projects or if special equipment is needed. i.e. kilns, pottery wheels etc.
Citizenship and history Classes (bilingual)		■		Requires classroom space; could be shared with other uses.

Component	Dedicated Facility	Shared Facility	Characteristic	Options
After school care for youth		■		Requires organizational commitment to determine space needs.
Family activities		■		Requires organizational commitment prior to space allocation. Activities could be indoor or outdoor.
Cooperative programs with other organizations		■		Organizational commitment needed to determine space needs. Could result in shared use of facilities.
Adult sports leagues for 55+		■		Requires organizational commitment to certain activities, before committing facilities. Facilities could include gymnasiums and ball fields.
Band and choral group singing		■		Some special equipment and storage needed but space can be of multi-purpose nature.
Stage for performances/drama		■		Organizational commitment to determine what level of stage facility is needed. Auditorium type facility can meet many uses. Fixed auditorium seating limits those uses.
Social gathering/dances		■		Multi–purpose rooms, lounges and lobby areas can meet these needs.
Access to health care services and facilities			■	Organizational commitment to facilitate users' understanding of health care services and transportation to same.
Mental health services		■		Requires organizational commitment for this service to determine space needs.

Source: Harison & Associates, 2001

The listing of service needs indicates that many of the needs can be met though multi-purpose meeting rooms that can be shared with other users for a variety of purposes. Programs responding to these needs could be housed in a number of community facilities such as the Senior Center, Community Center or schools, where space is already shared for a number of programs. Centralization of some of these programs in one convenient location can be beneficial to users. However, this may not always be possible as demand for programs exceeds the capacity of the existing Senior Center.

The programs that require dedicated facilities (dedicated based on function not age) are the following.

- Adult Day Care
- On-site cooking (Commercial Kitchen)
- Outdoor games
- Weight training
- Swimming
- Health clinics
- Juice/coffee Bar
- Arts and crafts classes

Currently, older adults can use the City's Sports Center for weight training and swimming. The remaining items on the list

would require the commitment to secure existing space or build new or redeveloped facilities to meet the needs.

There are several needs that require a change in the character of the services or facilities. These needs center on changing the image, ambiance and accessibility of the existing facilities and services. They do not require additional space. The constraints of the existing building's historic designation, its age, the cost of modification and the available space to work with are problematic.

Although the Senior Center is a busy place during weekday "prime time," (8:00a.m. to 4:00p.m.) there is excess room capacity of approximately 52%. This capacity does provide some flexibility to schedule existing or additional programs at times other than weekdays. The evening and weekend hours available could help accommodate the program needs of working retirees. This option should be considered prior to a decision to expand or build facilities.

The challenge of meeting the diverse needs of older adults need not be limited to one site. It may be cost prohibitive to modify the existing Senior Center to meet all needs. For example the Milpitas Sports Center has the dedicated type of facility that can meet senior needs for weight training, swimming and aerobic exercise. The likely future demand for this type of activity will grow as the boomers reach retirement, but that growth will not likely justify a separate sports facility for 55+ in Milpitas.

The use of multiple sites and/or shared sites with schools, community colleges, shopping malls, senior housing facilities are all options to consider in conjunction with discussion on the expansion or development of facilities.

X. Rental Housing Needs Analysis

The people of Santa Clara County and the City of Milpitas face a housing crisis. Reasonably affordable housing adequate to meet the needs of a large segment of the population is unavailable. The young, the old, and the poor are hardest hit. This senior rental housing needs analysis for the City of Milpitas is constructed upon the following three primary analyses:

- Santa Clara County and City of Milpitas forecast household growth from Section V, combined with analyses of renter-occupied households for householders 55 years and over.
- An estimate of the number of rental housing unit needs by Milpitas seniors 55+ in 2000, 2005, 2010, 2015, and 2020.
- An inventory of existing rental housing in Milpitas occupied by seniors 55+.

Forecast Renter-Occupied Household Trends

Building upon the population and household growth trends previously discussed and presented in Section V, Table 5, the next most important indicator to examine in this Senior Rental Housing Needs Analysis is the anticipated growth in households between 2000 and 2020 as addressed in the following Table 11.

During this period, total households County wide are forecast to grow 17.5% compared to a 112% increase anticipated among households 55 years and over, comparable to the growth in population during the same time frame discussed in Section V, Table 5. Thus, the County growth in households during the next two decades will result in the addition of an average of 4,950 new households annually (99,000 for the period).

Table 11 - County Senior Household Growth

	Households (000)		Renter Households (000)	
	Total	Seniors 55+	Total	Seniors 55+
2000	565.9	163.5	227.2	36.3
2020	664.9	346.9	267.3	76.4
Change %	17.5%	112.2%	17.6%	110.5%
Change #	99.0	183.4	40.1	40.1

Source: ABAG "Projections 2000", December, 1999, Research Network Ltd., 11/2001

In contrast, as the population ages during this period, the pool of senior households 55+ will grow by more than 9,000 households per year, on average, (183,400 for the period).

Table 11 also illustrates a similar pattern among renter-occupied households with a 17.6% increase overall and 111% growth among the County's renter-occupied senior householders 55+, resulting in the addition to the County of 2,000 senior, renter households each year during the two decades, (40,100 for the period).

As a share of total households, current and forecast renter-occupied households County wide comprise 40%. Further, among senior households in the County, history has demonstrated that 24 % are renters.

Forecast Senior, Renter-Occupied Household Trends

During the next two decades, total households in the City of Milpitas are forecast to grow 23.9% compared to a 102% increase anticipated among households 55 years and over. Thus, as evidenced in Table 12, City growth in households during the next two decades will result in the addition of an average of 200 new households annually, (4100 from 2000 to 2020). In contrast, as the Milpitas population ages during this period, the pool of senior households 55+ will grow by approximately 255 households per year, on average, (5,100 from 2000 to 2020).

Table 12 - City Household Growth

	Households		Renter Households	
	Total	Seniors 55+	Total	Seniors 55+
2000	17,100	5,000	5,200	663
2020	21,200	10,100	6,400	820
Change %	23.9%	102.0%	23.1%	23.7%
Change #	4,100	5,100	1,200	157

Source: ABAG "Projections 2000", December, 1999, Research Network, Ltd: 2001

Table 13 illustrates three forecasts of the City's renter households. Forecast A assumes that the growth in senior renter households from 2000 to 2020 will occur at the same rate (23.9%) as the growth forecast for all households in the City. Forecast A results in the addition of 157 senior renter households in the City during the next two decades (8 per year, on average). Two alternate forecast scenarios are presented labeled B and C.

Forecast B assumes that the growth in senior renter households from 2000 to 2020 will occur at the same rate (102.0%) as the growth forecast for all senior households. Forecast B results in an addition of 677 senior, renter households in the City during the next two decades, (34 per year on average).

Forecast C applies the rentership rate demonstrated in the Milpitas senior households today, (20%) to the forecast 2020 total senior households (10,100) to derive an estimated 2,010 senior renter households in 2020. Forecast C results in an additional 1,347 new senior renter households from 2000 to 2020, (an average of 67 annually).

Table 13 - Forecast City Senior, Renter-Occupied Household Growth

	Households		Senior Renter Households Forecast		
	Total	Seniors 55+	A	B	C
2000	17,100	5,000	663	663	663
2020	21,200	10,100	820	1,340	2,010
Change %	23.9%	102.0%	23.9%	102.0%	203.2%
Change #	4,100	5,100	157	677	1,347

Source: ABAG "Projections 2000", December, 1999, Research Network Ltd., 11/2001

The following Table 14 arrays the three forecast results for the years 2,005, 2010, 2015, and 2020. Examining these three forecasts, the City can expect to experience growth in senior renters ranging from 66, Forecast A, to 553, Forecast C, by 2005.

Table 14 - Forecast City Senior, Renter-Occupied Household Growth

	Households		Senior Renter Households Forecast		
	Total	Seniors 55+	A	B	C
2000	17,100	5,000	663	663	663
2005	18,850	6,079	729	806	1,216
2010	19,760	7,309	764	969	1,462
2015	20,490	8,685	792	1,155	1,737
2020	21,200	10,100	820	1,340	2,010

Source: ABAG "Projections 2000", December, 1999, Research Network Ltd., 11/2001

Based upon most recently available Census information (1990), 35% of the senior renters are spending less than 35% of their income on gross rent while the remainder (65%) are spending 35% or more, and are, therefore, in need of some rent relief. Applying a rate of 65% in need of rent relief to the 2000 City estimate of senior renters (663), approximately 431 senior renters are today paying 35% or more of their income as rent. By 2020, this group of senior renters needing rent relief may grow to a minimum of 533, (65% of 820) or a maximum of 1,307, (65% of 2,010) senior renters.

Inventory of Existing Senior Rental Housing Opportunities

With a currently estimated 431 senior renters in need of rent relief, an investigation into available opportunities for such seniors is instructive. This investigation begins with an overview of the rental housing market locally and regionally to provide context for such senior rental opportunities. The 1990 median rent in Milpitas was $869 monthly compared with $349 in 1980, an increase of 149% during that decade. Although comparable Census data is not yet available for 2000, the following Table 15 highlights asking rents at a selection of market rate apartment properties in the City of Milpitas.

As Table 15 describes, rents in the City range from $850 to $2,810 monthly depending on property and unit size. Although an average rent comparable to the 1990 figure is not available, the above table adequately states the fact that apartment rents in Milpitas have escalated substantially from their average 1990 figure of $869. In fact, Fair Market Rents in 2000 published by the Santa Clara County Housing Authority describe a range of $886 (studio) to $1,673 (three-bedroom) per month.

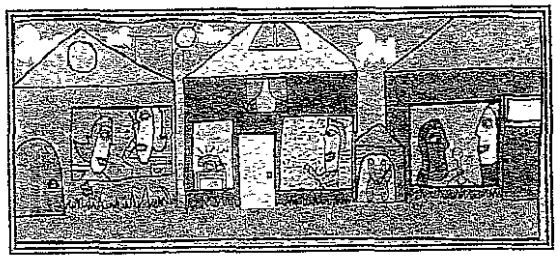


Table 15 - Milpitas Market Rate Apartment Rents, 2001

Milpitas Apartment Rental Rates, 2001					
Property Name	Studio	1 bed/1bath	2 bed/1 bath	2 bed/2 bath	3 bed/1 or 2 bath
Casa Grande		$1,495	$1,695		$1,900
Indian Hill			$1,250		$1,450
Mill Creek & Brander Mill		$1,695	$2,285	$2,450	$2,810
Spinnaker Pointe		$1,650		$1,900	
Sunnyhills	$850	$950	$1,150		$1,250
Suntree Garden		$1,450	$1,750	$2,050	$2,150
Victorian Square		$1,800	$1,900	$2,000	
Rent Range	$850	$950 - $1,800	$1,150 - $2,285	$1,900 - $2,450	$1,250 - $2,810
Source: Housing Element, City of Milpitas; Bay Area Economics, 2001					

Milpitas Age or Income-Restricted Rental Housing Opportunities

Monte Vista Apartments by Bridge Housing has no tenant age restriction and offers low, very low and moderate income apartments. The project totals 306 units and reports that there are currently 50 residents over 55 years of age, 19 (38%) of whom were previously residents of Milpitas. A comparable share reported their prior address to be San Jose (20 residents, 40%) Twenty of the senior residents are in the 50% of AMI category, 25 are at 60% AMI, 5 are market rate, and none are Section 8. Fully 36 of the 50 senior residents (72%) are Asian/Pacific Islander. An additional 6 (12%) are Hispanic. Equal shares of the senior tenants reported their ethnicity as Caucasian (4%) or Russian (4%). The current waiting list at Monte Vista Apartments is 178 people, 16 of whom are seniors (9%). Of these seniors on the waiting list, 4 are at 50% AMI and 12 are Section 8.

Terrace Gardens Apartments offers rental housing for tenants 62 years and over or 55+ with a disability. All 150 units include one-bedroom with rent equal to 30% of income (minimum of $304 to max of $621). Tenants must pay for a monthly meals package (5 meals per week) at $118 per person per month (existing tenants) or $155 per person per month (new tenants). The project reports that 80% of tenants use their meals package. No medical assistance is provided at Terrace Gardens.

This property reports 100% occupancy with a 6 to 10 year waiting list (approximately 500 applicants). The waiting list

participants as of 1998 included one-third Milpitas residents (126 of 377). Further, half of the Milpitas applicants (63 of 126) reported currently living with family, while 41 rent, 13 own, 6 own a mobile home and 3 didn't respond.

Sunnyhills Apartments, 1724 Sunnyhills Drive, is a Section 236 project providing 171 units for very low-income tenants and 6 units for low-income tenants. Sunnyhills Apartments (171 units, 149 Section 8 units) were at-risk several years ago with new ownership/management. However, HUD, Housing Authority of Santa Clara County and City of Milpitas convinced the new ownership/management to maintain the long-term affordability via a HUD contract that now extends to October 2011.

Section 8 Housing Opportunities

Section 8 tenants in the City of Milpitas total 330, 25% of whom (84) are considered elderly (65+). More than half (58%) of the 330 tenants are Asian/Pacific Islander, followed by 23% Hispanic, 12% White, 6% Black, and 1% other. The waiting list of Section 8 applicants living in Milpitas totals 714, 13% of which (93) are considered elderly by HUD (65+). More than half (54%) of the 714 applicants are Asian/Pacific Islander, followed by 20% Hispanic, 12% White, 12% Black, and 2% other.

Further, although not currently a factor in Milpitas, an estimated 7,726 subsidized units in the County have been identified as threatened by conversion to market rate housing.

Mobile Homes As Affordable Senior Housing

The number of mobile home units in urban Santa Clara County declined from 3,308 in 1995 to 2,364 in 1999, a 29% drop. This is important because mobile homes are considered affordable housing and, often, senior housing. Mobile homes in Milpitas as of 1997 were estimated at 560 with a population estimated at 900 (1.6 persons per household) including Pioneer Mobile Home Park (180 spaces), The Village (196 spaces) and Mobilodge (145 spaces).

Pioneer Mobile Home Park offers mobile homes for ownership on spaces for rent to residents 55 or over. Approximately 250 residents live in the 180 total mobile homes (1.39 persons per household). Mobile homes are not available for rent. City Rent Control Ordinance, a form of subsidy, controls all space rents.

Johnsville Mobile Home & RV Park offers 45 mobile home units to the general population with no age restriction. Of the 45 mobile homes, 5 residents (11.1%) are seniors 55+. All 45 mobile homes are owned and all spaces are rented. Eleven of the 45 spaces (24.4%) are governed by the City Rent Control Ordinance with the remaining under "long-term" leases.

Friendly Village Mobile Home Park includes 196 spaces to the general population with no age restriction. Of the 196 units, approximately 75 residents (38.3%) are seniors 55+. All 196 mobile homes are under ownership with spaces rented and rental rates controlled by City Rent Control Ordinance.

Proposed Senior Rental Housing Opportunities

For senior renters seeking affordable housing, alternatives include not only those properties previously discussed but also include properties in adjacent cities or elsewhere in the County as well as planned or proposed senior rental housing properties in Milpitas or nearby.

Adjacent Area Housing Markets

An examination of the Santa Clara County apartment market confirms that the rental housing crisis described in Milpitas exists County-wide as well. As Table 16 illustrates, average rents for one and two-bedroom apartments range from $1,146 to $1,491. Aggravating the high rent trend, in January 2000, a 2.6% vacancy rate existed among Santa Clara County apartments surveyed. Such a low vacancy rate implies the need for at least 4,000 new apartments to normalize the supply and stabilize rents.

Table 16 - County Market Rate Apartment Rents, 2000

Santa Clara County Average Apartment Rents, January, 2000			
	Average Low Rent	Average High Rent	Overall Average
1 bed	$1,100	$1,192	$1,146
2 bed/1 bath	$1,156	$1,226	$1,191
2 bed/2 bath	$1,430	$1,553	$1,491
Source: Tri-County Apartment Owners Association, projects with 50 units or more.			

According to a 1997 City of San Jose needs assessment, the recent escalation of rents has put some existing subsidized units in jeopardy of conversion to market rate. Approximately 50% of San Jose's subsidized units are in jeopardy of being converted to market rate. Further, vacancies in affordable senior housing properties are virtually nonexistent and waiting lists are lengthy.

Based on conditions County-wide and in adjacent City of San Jose, in particular, the needs for affordable senior rental housing is not likely to be supplied in areas outside of Milpitas as those jurisdictions are experiencing affordable housing conditions as severe as Milpitas.

Currently planned Milpitas affordable housing opportunities include:

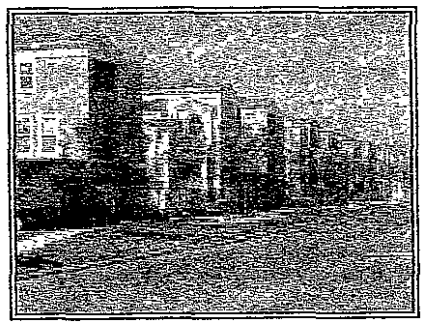
- Main Street Manor, offering either 58 or 76 1-bedroom senior affordable units.
- Summerfield by Bridge Housing Corp, a 110 unit small lot single-family detached property located just south of Great Mall Parkway, north of Starlite Pines, that includes 22 units priced below market rate.
- Another Bridge Housing Corp project, 306 apartments located opposite the Great Mall between South Main and Abel Streets to offer 50% of its units to low and very low-income households (153 units).

Assuming, unrealistically, that all of these planned affordable housing properties could be offered to seniors only, a total of 251 units are included therein. Compare these to an aggregate of 235 wait-listed senior applicants at Monte Vista (16 from Milpitas), Terrace Gardens (126 from Milpitas), and on the Section 8 list (93 from Milpitas) and it can be concluded that the current need

just for senior renters could be solved with the three new projects. However, acknowledging the fact that not all of these new units will be restricted to seniors and the dramatic growth forecast for senior renters in the future, more projects beyond those identified are needed.

Review of Finance Options for Affordable Senior Rentals

The City of Milpitas has approached the development of affordable senior rentals through each of the following finance options:



- CDBG funds for rehabilitation and construction. California State redevelopment law mandates that 20% of the tax-increment generated by these project areas must be set aside to improve, preserve, and increase the supply of affordable housing.

- The City's RDA has spent over $18 million on Terrace gardens and the Bridge project.

- Gap Financing by the City for developers of affordable Rental housing.

- Milpitas Density Bonus Incentive Program for very-low and low-income or seniors housing.

- Strengthen relationship with non-profit housing development organizations.

Santa Clara County has taken a number of steps to rectify the lack of adequate funding for affordable housing. Most notably, the County has aggressively pursued the establishment of a Housing Trust Fund. The purpose of the Housing Trust Fund is to provide a continuous and renewable source of local funding for affordable housing projects throughout the County that would augment other federal, state, local and private sources. The Housing Trust Fund is to be a combined effort of local government and the private non-profit and for-profit sectors. So far, the Trust Fund has raised approximately $7 million of its $20 million goal. Once the goal is met, the Trust Fund will begin issuing funds for affordable housing projects, primarily in the form of loans that can be recycled back into the trust fund so further loans can be issued.

Other programs include:

- The HUD Section 8 Rental Assistance Funds program is federally funded, but locally administered, rental assistance for low-income families, senior citizens, and the disabled. The County Housing Authority administers the Section 8 Program for most of Alameda and Santa Clara Counties.

- HUD 202/HUD811 programs are awarded on a competitive basis specifically for the development of affordable rental housing for seniors (Sec. 202) and for the disabled (Sec. 811).

- The California Housing Finance Agency (CHFA) provides a variety of tax-exempt bond financing for the development and preservation of affordable housing.

- Developers can apply to the State for an allocation of tax credits to finance low-income rental housing developments. The tax credits are syndicated to raise project equity.

- Local jurisdictions may apply to the California Debt Limit Allocation Committee (CDLAC) for an allocation of bond authority to provide financing to developers of qualified rental developments.

- To facilitate the development of affordable housing in the jurisdictions, some cities waive their development fees on affordable units and some cities impose in-lieu fees on market-rate developments, which roll over into affordable housing funds. In addition, cities can allow for modifications in the project plans, such as reduced parking requirements for affordable housing projects. Some jurisdictions' Housing Elements have policies to encourage rezoning of non-residential land to residential uses, which increases the supply of land. These city "concessions" are aimed at providing incentives for the development of affordable housing by decreasing per unit costs.

XI. Strategic Opportunities

The new millennium presents many challenges that create new opportunities to meet the changing needs of an aging population. Dr. Ronald Schoeffler, Chairperson for the National Institute of Senior Centers (NISC) envisions senior centers as the "Main Entrance" to healthy and independent living in later life. As vital aging centers they are highly visible, community focal points. When planning services and facilities for the future adult centers, community service professionals should think of the center as a "Main Entrance" to home, community and social supports that can help delay or prevent more costly and restrictive institutional care. The young-old will resist programs and facilities that are age-segmented. Look for centers of the future to be called ***Lifetime Centers, Wellness Centers*** or ***Learning Centers*** - not senior center. It is vitally important that these centers maintain quality services for the diverse populations they serve. Emerging roles for Center Directors include: partnering and coalition building, planning multi-disciplinary services and programs, and supporting a seamless continuum of services that meet the needs of aging adults and their families.

The graying of California will have profound implication for all aspects of society. With a larger population of elders and greater ethnic diversity than the United States as a whole, California is pioneering a model for meeting the challenges of dramatic demographic shift.[40] Milpitas reflects the statewide changes and by 2020 will be home to nearly **20,000** older adults constituting 26% of the total City population. Whether serving as the primary provider or working in collaboration with other public and private partners, there is a role for the City in meeting the challenges of an aging society. Both social and physical infrastructure changes are needed to respond to the demographic and lifestyle trends and to respond to the priority needs identified in previous sections of this document.

In their book ***Successful Aging***, Rowe and Kahn cite three key components to successful aging.

- Low risk of disease and disease-related disability
- High mental and physical functioning
- Active engagement with life

Although all three components are important, a major increase in the quality of life for the old–old can be attributed squarely to the third factor: active engagement in life. Many elderly feel lonely and isolated even if they are members of caring families, for few families are adept at integrating the elderly into daily family life. Social connectedness is a powerful predictor of good health and can delay or prevent injury and disability.[41] Here is where the City, churches and local based community organizations clearly have a role to play.

The foregoing needs analysis identifies several strategic opportunities for the City to consider in planning for the future. These opportunities are not intended to be inclusive of all the City's functions and activities. Rather, they present opportunities that are responsive to the current demographics of the 55+ residents of Milpitas, current recreation trends and expressed community needs that surfaced during this process. The

[40] op. cit. ***Fault Lines***.

[41] ***Successful Aging***, John Rowe and Robert Kahn.

opportunities build on the City's strengths and may emphasize a different role for the City in some areas. It is believed that these opportunities will position the City for the future and enhance its capability to secure needed resources and plan strategically for an aging population. These opportunities will change as the community changes and will need to be re-evaluated on a regular basis to remain responsive to changing needs, trends and priorities.

The demonstrated success of past City efforts bodes well for the development of future programs and services. The City's commitment to serving older adult is proven when comparing Milpitas' service levels with those of the other cities in the Benchmark Survey. With the growth in the 55+ group and the emergence of baby boomers as customers for adult services, new program priorities unfold. The profile of the older adult is changing. As this profile evolves, service providers need to respond with programs reflective of the potential users' culture and leisure preferences. The foregoing demographic and trends analysis and needs assessment, based on the input received from staff and stakeholders, reveals the following strategic opportunities and specific strategies for each as priorities for action by the City in the future. Since Milpitas has had the foresight to look ahead and begin planning for the future, when the "Age Wave" peaks, many of these strategies can be implemented as the population ages.

> Today with the postponement of old age, caused by extended longevity, we are witnessing a new life stage – ***middlescence*** - rising up between 40 and 60. Like adolescence this new middlescence will likely turn out to be a period of high-spirited growth and ascension, not retreat and decline. – Ken Dychtwald *Age Wave*-1999

Strategic Opportunities

Facilitating Dependent Care - The City can be a facilitator and partner in assuring that families have access to affordable dependent care near their homes. This includes elder care, respite care and adult day care. At least 81 Milpitas residents currently travel to San Jose or Fremont for these services.

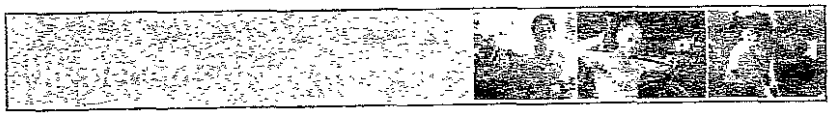
Strategies

- Collaborate with health care providers to offer caregiver skill development programs for paid and volunteer caregivers to ensure quality care giving for aging adults.
- Partner with other agencies to provide community support networks for respite care, information exchange, advocacy and family/caregiver support for the "sandwich generation" and others.
- In partnership with Live Oak Day Dare, Alzheimer's Association or other service provider, facilitate the location of an adult day care center and services in the City. The center needs to be easily accessible and meet the required codes for licensing.
- Consider a granting program to offer subsidies for adult day care for those users who cannot afford to pay the fee.

Fostering Health and Wellness - Educating older adults about health and wellness and providing instruction, facilities and community-based services for them will be key components of services for the future.

Strategies

- Expand fitness and wellness programs targeted to adults 55+ utilizing the facilities at the Milpitas Sports Center.
- Consider offering evening aerobics, fitness and mind/body activities that cater to the baby boomers at the Senior Center or Sports Center.
- Expand adult sports league activity with special leagues for 55+ adults.



- Collaborate with health care providers in providing health clinics at the Senior Center for various health needs: hearing, vision, podiatry and others.
- Expand health education programs both day and evening for older adults that include nutrition, mental health, alternative (non-western) medicine, stress management and "how to" access health and wellness programs.
- Provide informational resources and translation services to inform older adults about health care options and benefits.
- Serve as a community-based center for information and support groups for widows, cancer survivors and other illnesses.

Promoting Lifelong Learning - Lifelong learning opportunities that foster personal development and learning-centered retirements are hallmarks of the future. Many of these will be community based and industry based.

Strategies

- In partnership with Adult Education expand offerings in English as a second language and citizenship to reach the new-immigrant older adults.

- Partner with Community Colleges or other higher learning institutions as a satellite site for emeritus programs, workshops, courses and lectures that cater to the new-old. Course content can include any of the following.

  - Financial planning and investment and debt management
  - Computer lab and instruction from the basics to more advanced such as desktop publishing, and digital photography
  - Classes in art, music and literature that the boomers never had time for in their working years
  - Current events – political and cultural that relate to the new-old age group
  - Genealogy and family heritage
  - Career transition skills for those remaining in the work force
  - Home repair, remodeling and interior decorating

- Offer educational travel opportunities and cultural outings with an emphasis on "off the beaten path" scheduled to attract the working retiree.

- Consider opportunities for online learning that might be preferred or necessary for the homebound senior.

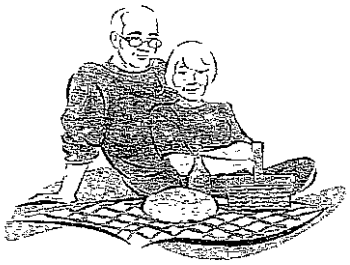
- Develop fee-based programs for business and industry that focus on retirement planning and issues related to aging.

Strengthen Outdoor Recreation Experiences - The active and ageless boomers appreciate the outdoors and the natural resources of the environment. Older adults will seek active and passive recreation pursuits in public parks, trails and open space areas.

Strategies

- Collaborate with the County Parks Department utilizing the resources of Ed Levin Park and other County parks for picnicking, interpretive programs and other outdoor recreation activities.

- Develop City parks that provide accessible facilities, trails and areas for relaxation with the older adult in mind.



- Plan with outdoor oriented groups such as the Sierra Club a full spectrum of outdoor recreation excursions from hiking and bird watching to adventures such as river rafting and rock climbing to appeal to the various interests of the 55+ adults.

Providing Accessible and User-friendly Facilities - The facilities of the future will be convenient, accessible, and designed with older adults in mind. Ambiance and social gathering areas will be important to attract young-old to the center. Age segregated titles and programs may not be relevant.

Strategies

- Consider changing the name of the Senior Center to Community Adult Center or other name to attract the new-old cohort.

- Pursue the expansion of operating hours to include evenings and weekends for the Senior Center, Community Center and Sports Center to maximize use of existing facilities to meet the needs of the growing older adult population.

- Design any new facilities and rehabilitate existing facilities with the older adult in mind. Facilities should be welcoming and ergonomically designed for the older adult.

- Improve access, lighting, and sound system in the existing Senior Center.

- Consider the feasibility of the following improvements to the existing Senior Center.

  - Juice/coffee bar
  - Commercial kitchen
  - Additional storage areas
  - Rest room upgrades
  - Enclosure of the courtyard area to enable year round use for table games and lounge area
  - The addition of an outdoor games area and patio
  - Relocate any non-senior support staff to other sites to free up space for use as counseling rooms or small group activity

- Develop a community computer lab with workstations offering Internet access. This type of facility can be shared by users of all ages. The Senior Center, City Library, Community Center or Shopping Mall are possible locations.

- Evaluate Citywide facility needs for community programs to determine the feasibility of developing a major community facility that could address the needs of older adults and other age groups.

Enhancing Cultural and Generational Unity – The rich cultures of Milpitas provide an opportunity for cultural exchange and appreciation of the value of the community's diversity. Young and old together can celebrate the community's culture, character and spirit.

Strategies

- Continue balancing meals programs with traditional and cultural-specific meals.
- Facilitate bilingual instruction in ESL for non-English speakers.
- Cooperate with the City Library or organizations such as Laubach Literacy for tutoring programs for adults in ESL and literacy.
- Offer workshops and discussions on different cultures and history to foster cultural understanding.
- Showcase different cultures in special event programming to enhance cultural unity.
- Provide staff training in multi-cultural programming and cultural awareness.
- Organize family events or meals programs where young and old can come together, e.g. "Tea with Grandma"
- Initiate intergenerational programs that bring young and old together such as foster grandparents, Tel-Pal, tutoring and mentoring.

- Evaluate the needs of multi-generational families and develop workshops, counseling and educational programs that assist the children, parents and grandparents in accessing resources and developing life skills.

Advancing Information Access through Technology - Seniors are online and with the tech-savvy boomers aging, Internet access and interaction will be essential to reach and serve new users. Educational programs to improve computer skills will be in demand.

Strategies

- Incorporate wiring and cabling for the latest technology into new development or redevelopment of senior centers, senior housing and retirement communities to provide Internet access.
- Facilitate and support online information resources on senior issues, concerns and services to assist seniors and their families.
- Develop a community computer lab with workstations for Internet access and e-commerce in a convenient location for access by the public.
- Provide training tailored to older adults needing to develop their computer skills.
- Develop interactive online City information services for senior program registration and other transactions.

Planning for Housing Options - The City can facilitate a continuum of housing options from independent living to full service nursing care to meet the needs of an aging population and allow resident to "age in place."

Strategies

- Continue to provide incentives to encourage private development of senior rental housing and assisted living facilities. Consider the reduction, subsidy or elimination of development fees for affordable senior housing.
- Encourage land use designations such as secondary dwelling units, mixed use and higher densities can enable the production of affordable units.
- Work with legislators and Building Officials to modernize regulation, codes and financing of assisted living facilities and residential care facilities.
- Assist seniors with home improvement, special equipment and repairs to allow them to age in place through Home Access program and/or other assistance grants.
- Ensure that future senior housing infrastructure is wired to accommodate access to the latest telecommunications.
- Pursue public/private partnership for future senior housing developments in Milpitas.
- Encourage planning that converts neighborhoods to elder-friendly places that may include in-fill housing for seniors.
- Plan the location of new senior housing with senior transportation needs in mind.

Supporting Transportation Options - Sustaining mobility is important to older adults to keep them engaged in life. A continuum of transportation options is needed to serve the homebound and the more active senior wanting access to cultural and special events in the area without having to drive the congested highways.

Strategies

- Encourage new senior housing facilities to include shuttle service for residents to public facilities and public transit stops.
- Provide transportation information online to inform seniors about transportation services.
- Consider the feasibility of a fixed route cross-town shuttle similar to the system in Palo Alto that serves residential neighborhoods, senior housing, public facilities and shopping areas.
- Work with the VTA Outreach staff to improve the on-time response and reliability of the Outreach taxi service.
- Encourage the concept of a volunteer non-profit, escort service for seniors to transport them to shopping and medical services.
- Schedule local outings on evenings and weekends to sporting events, theatre and regional destinations.

Improving Marketing and Communications - The public needs and wants more information on what services are available. There is a need for public information to be made available in non-English languages to reach target groups and the underserved in need of service.

Strategies

- Provide verbal and written public information in the language appropriate for the target group you are trying to reach.
- Utilize all media including non-English to market programs and services.
- Initiate expanded use of the City's web site to facilitate interactive online transactions.
- Design marketing efforts to promote a positive image of older adults and their value to the community.
- Minimize age-segmented marketing by using value-positive terms, and market to the interests of 55+ adults: healthy lifestyles, cultural enrichment, travel experiences.
- Identify current customer base survey and track their satisfaction with programs and services. Use feedback to make changes in customer service and programming.
- Network with other public agencies, community groups, and health care providers in cooperative marketing efforts to reach new customers.
- Foster a cooperative partnership with local media and Cable TV to develop features, op-editorials, as well as news items on older adult's accomplishments and experiences.

XII. Conclusion and Recommendations

The City is in a strong position to move forward with the implementation of the strategies identified. The City's commitment to serving older adult is proven when comparing Milpitas' service levels with those of the other cities in the Benchmark Survey. With the growth in the 55+ cohort and the emergence of baby boomers as customers for adult services, new program priorities unfold.

With the constraints of fiscal and human resources, it is a challenge for decision makers to select priorities for strategic implementation. The recommended strategies in the previous chapter are based on the needs analysis process presented in Chapters VIII – X. It is important to note all of the strategies are important. However, in some areas the needs are not being met at all or only to a limited degree e.g. adult day care. In other areas needs are met at some level but improvements are needed to better address current and future needs. Some of the strategies recommended simply call for the continuation of good practices and partnerships already in place. Not all the strategies proposed require additional funds; many simply focus on an operational change to meet the needs. The following table categorizes the top priorities to help guide decision-making and allocation of resources in the future.

Tier 1 presents strategies that respond to needs that are unmet or met to a limited degree. Therefore, these strategies are deemed as higher priority.

Tier 2 strategies are those that propose improvements to existing service levels to address users' changing needs and to enhance existing services.

Strategies that emphasize the continuation of ongoing operations and programs are not listed here.

> Age is mind over matter. If you don't mind it doesn't matter.
>
> – George Burns

Table 17 - Strategic Priorities

Tier 1 - Recommended Priorities	Implementation Responsibility
Facilitating Dependent Care	
• Establish an Adult Day Care Center in Milpitas	City with non-profit provider
• Offer caregiver skill development programs	City collaborate with health care providers
• Provide community support networks for caregivers and families	City partner with other agencies
• Consider a granting program to offer subsidies for adult day care for those users who cannot afford to pay the fee	City with health care associations
Providing Accessible and User Friendly Facilities	
• Design new facilities and rehabilitate existing facilities to improve access and accommodate the special needs of older adults.	City
Enhancing Cultural and Generational Unity	
• Initiate intergenerational programs	City
• Evaluate the needs of multi-generational families	City with County Social Services
• Provide staff training in multi cultural programming and awareness	City
Advancing Information Access through Technology	
• Develop interactive online City information re. older adult resources and services for seniors	City
• Develop Community Computer Lab and training for older adults	City
• Incorporate wiring and cabling for the latest technology to senior facilities and housing	City with public utilities
Planning for Housing Options	
• Pursue public/private partnership for future senior housing development in the city	City
• Encourage planning that converts neighborhoods to elder-friendly places that may include in-fill housing for seniors	City
Support Transportation Options	
• Encourage new senior housing facilities to include shuttle service for residents	City
• Consider the feasibility of a fixed route cross-town shuttle	City
• Encourage the concept of a volunteer non-profit, escort service for seniors to transport them to shopping and medical services	City with non-profit

Tier 2 – Recommended Priorities	Implementation Responsibility
Fostering Health and Wellness	
• Expand fitness and wellness programs targeted to adults 55+ utilizing the facilities at the Milpitas Sports Center	City
• Consider offering evening aerobics, fitness and mind/body activities that cater to the baby boomers at the Senior Center or Sports Center	City
• Expand adult sports league activity with special leagues for 55+ adults.	City
• Provide health clinics at the Senior Center for various health needs: hearing, vision, podiatry and others	City and health care associations
• Expand health education programs both day and evening for older adults that include nutrition, mental health, alternative (non-western) medicine, stress management and "how to" access health and wellness programs	City
• Serve as a community-based center for information and support groups for widows, cancer survivors and other illnesses	City with health care associations
Promoting Lifelong Learning	
• Expand offerings in ESL and citizenship	City with Adult Education
• Collaborate with Community College and others for emeritus programs, workshops, courses and lectures that cater to the new-old	City with Community College or other educational institutions
• Offer educational travel opportunities and cultural outings with an emphasis on "off the beaten path" scheduled to attract the working retiree	City
• Consider opportunities for online learning that might be preferred or necessary for the homebound senior	City with Adult Education/Community college
• Develop fee-based programs for business and industry that focus on retirement planning and issues related to aging	City with local businesses
Strengthen Outdoor Recreation Experiences	
• Utilize the resources of Ed Levin Park and other County parks for picnicking, interpretive programs and other outdoor recreation activities	City collaborate with the County Parks Department
• Develop City parks that provide accessible facilities, trails and areas for relaxation with the older adult in mind	City
• Plan outdoor recreation excursions from hiking and bird watching to adventures such as river rafting and rock climbing to appeal to the various interests of the 55+ adults	City with outdoor oriented groups such as the Sierra Club
Providing Accessible and User Friendly Facilities	
• Change the name of the Senior Center to Community Adult Center or other name	City
• Pursue the expansion of operating hours to include evenings and weekends for the Senior Center, Community Center and Sports Center to accommodate working older adults	City
• Improve access, lighting, and sound system in the existing Senior Center	City

Tier 2 – Recommended Priorities	**Implementation Responsibility**
• Consider improvements to the existing Senior Center: ◊ Juice/coffee bar ◊ Commercial kitchen ◊ Additional storage areas ◊ Rest room upgrades ◊ Enclosure of the courtyard area to enable year round use for table games and lounge area ◊ The addition of an outdoor games area and patio ◊ Relocate any non-senior support staff to other sites to free up space for use as counseling rooms or small group activity	City
Enhancing Cultural and Generational Unity	
• Facilitate bilingual instruction in ESL for non-English speakers	City with Adult Education
• Develop tutoring programs for adults in ESL and literacy	City with County Library or organizations
• Offer workshops and discussions on different cultures and history to foster cultural understanding	City
• Showcase different cultures in special event programming to enhance cultural unity	City
Planning for Housing Options	
• Provide incentives to encourage private development of senior rental housing and assisted living facilities. Consider the reduction, subsidy or elimination of development fees for affordable senior housing	City
• Work with legislators and Building Officials to modernize regulations, codes and financing of assisted living facilities and residential care facilities	City with League of Cities and/or ICBO
• Assist seniors through Home Access program and/or other assistance grants, with home improvement, special equipment and repairs to allow them to age in place	City and non profits
• Pursue public/private partnership for future senior housing developments in Milpitas	City with developers
Support Transportation Options	
• Provide transportation information online to inform seniors about transportation services	City with VTA
• Improve on-time response and reliability of Outreach taxi service	City with Outreach/VTA
• Schedule local outings on weekend and evenings to sporting events, theatre and regional destinations	City and local clubs and organizations
Improving Marketing and Communications	
• Provide verbal and written public information in the language appropriate for the target group you are trying to reach	City
• Utilize all media including non-English to market programs and services	City with media
• Initiate expanded use of the City's web site to facilitate interactive online transactions	City

Tier 2 – Recommended Priorities	Implementation Responsibility
• Design marketing efforts to promote a positive image of older adults and their value to the community	City
• Minimize age-segmented marketing, use value-positive terms, and market to the interests of 55+ adults: healthy lifestyles, cultural enrichment, travel experiences	City
• Identify current customer base survey and track their satisfaction with programs and services. Use feedback to make changes in customer service and programming	City
• Network with other public agencies, community groups, and health care providers in cooperative marketing efforts to reach new customers	City with other service providers
• Foster a cooperative partnership with local media and Cable TV to develop features, op-editorials, as well as news items on older adult's accomplishments and experiences	City with local media

XII. Appendices

A. Glossary of Terms and Acronyms

B. Milpitas Services Inventory

C. Milpitas Senior Center Room Calendar

D. Stakeholder Focus Group Survey Responses

E. Focus Group Notes – 8-14-01 – Milpitas Senior Center

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G. Stakeholder Interview Summary

H. Questionnaire - Benchmark Survey Comparable Cities

I. Detail - Benchmark Survey Comparable Cities

J. Comparison of Senior Services offered by Comparable Cities

Appendix A -Glossary of Terms and Acronyms

Age Wave : Title of book authored by Ken Dytchwald, (1989) often "age wave" is used as a metaphor for the major demographic shift as those born in the post World War II era (1946-1964) age.

Age Power: Title of the book authored by Ken Dytchwald, (1999), age power symbolizes the huge consumer and political power of the population aged 50 years and over.

Baby Boomer: Persons born post World War II (1946-1964), this group started turning 50 in 1996.

Sandwich Generation: Defines the adult population aged 45-55 who are responsible for the care of dependent children and aging parents.

New-Old or Young-Old: The post World War II baby boomers now entering their 50's.

Old-Old: Old age is a moving target as life expectancy increases, generally age 75 and over.

Rehirement: Used in reference to the trend of retirees seeking work or setting up businesses.

Middlessence: Middle aged adolescence rising up between age 40 and 60 as mature adults transition to late adulthood and old age.

AARP: American Association of Retired Persons

ABAG: Association of Bay Area Governments

COA: Council on Aging for Santa Clara County

CDBG: Community Development Block Grants

RDA: Redevelopment Agency

HUD: Housing and Urban Development (Federal Agency)

VTA: Valley Transportation Authority serving Santa Clara County

BART: Bay Area Rapid Transit, regional transportation authority serving the greater bay area.

NRPA: National Recreation and Parks Association

ICBO: International Council of Building Officials

ESL: English as a Second Language

Appendix B - Milpitas Services Inventory
(December 2001)

Activity	Frequency	Estimated Attendance per Month	Sponsoring Agency
Health and Wellness			
Meals (Nutrition) Program	Daily	1800	County of SC/City
Fit over 50 (Exercise)	3 days wk/2hrs	360	City
Arthritis Aquatics	3 days wk/1.5hrs	300	City
Great Strides Walking Program	2 days wk		Regional Medical Center of San Jose, Great Mall of the Bay Area, City
Vial of Life Program	Available Daily	1	Stanford University/City
Flu Shots	1 x year	300 +	County of SC/City
Blood Pressure Checks	2 days wk / 1 hr	40	City
Health Education Seminars	2 X Monthly	180	Guest Speakers/City
Subtotal		***2981***	
Lifelong Learning			
English for Chinese Speaking/Citizenship	2 days wk / 1.5 hrs	720	Chinese Evergreen/City
Guitar	2 days wk	168	City
Art Classes	4 days wk	480	City
Calligraphy	1 x wk 1.5 hrs	120	Chinese Evergreen/City
Chinese Opera	1 x wk 1.5 hrs	160	Chinese Evergreen/City
Subtotal		***1648***	
Social Recreation			
Chinese Evergreen Club		500 current total	Chinese Evergreen/City
Tap Dance	1 x wk	128	City
Line Dance Classes	2 x wk	160	City

Activity	Frequency	Estimated Attendance per Month	Sponsoring Agency
Summer Concert Series	1 x month 4 months total	30	City
Trips/Excursions	3 trips a month/average	60	City/Travel Agency
Maj Jong	Daily	640	Chinese Evergreen/City
Bingo	1 x wk	120	City
Dances	7 x month	140	Chinese Evergreen/City
AARP Meetings	1 x month	10	AARP
Indoor Games Billiards/Darts	Daily	20	City
Hula Dance	1 x wk 1 hr	48	City
Karaoke	1 x wk 2.5 hrs	120	Chinese Evergreen/City
Potluck Dinners	1 x month	30	City
Vintage Wine Chorus Group	1 x wk 1 hr	16	City
Subtotal		***2022***	
Self Help Programs			
55 Alive/Mature Driving	4 x year	47	AARP
Insurance Counseling (HICAP)	1 x month	3	HICAP
Long Term Care Counseling	Available daily	6-8	City/CDBG
Legal Assistance (SALA)	2 x month	10	City/CDBG
Independent Living	Available daily	43	City/CDBG
Homeowner Renter Assistance	Available daily	85	Franchise Tax Board
Project Match	Available daily	6	City/CDBG
Home Access Program	Available daily	8-10	City/CDBG
Subsidized Housing	Available daily	62	City/CDBG
Handy Worker Program	Available daily	6	City/CDBG
Home Repairs (Loans)	Available daily	8	City/CDBG
Transit/ Info./Tickets/Passes	22 days average	188 sold	VTA/BART/City

Activity	Frequency	Estimated Attendance per Month	Sponsoring Agency
Shuttle Bus	Daily Nut. Pro. Only	387 monthly	City/County
Subsidized Para-Transit	Available daily	28	Outreach/City
Employment/Housing Referral	Available daily	49	City/CDBG
Subtotal		***938***	
Social Services			
Social Services	Available daily	75	City
Case Management	Available daily	30	City
Live Oak Adult Day Care	Available daily	18 Referrals	City/CDBG
Information & Referral	Available daily	85	
Brown Bag	1 wk	1330	City/CDBG/Food Bank
Subtotal		***1538***	
Grand Total		***9127***	

Source: Harison & Associates/City of Milpitas

Appendix C – Milpitas Senior Center Room Calendar – Hours Available (not booked)

Sample Month May 2001

Date	Day	Art Room	Auditorium	Dance Room	Game Room	Lounge
1	Tues.	12:00-1:00p.m. after 3:30p.m.	3:30-4:00p.m. after 6.30p.m.	After 12:30p.m.	After 6:00p.m.	9:00-12:30p.m. after 4:00p.m
2	Wed.	12:30-1:00p.m. after 4:00p.m.	3:30-4:00p.m.	9:00-9:45a.m. 12:30-2:00p.m. 3:45-5:30p.m.	After 6:00p.m.	After 1:30p.m.
3	Thurs.	After 3:30p.m.	3:30-4.00p.m. 6:30-7:00p.m. after 8:30p.m.	9:00-3:30p.m. after 6:30p.m.	After 6:00p.m.	After 2:30p.m.
4	Fri.	3:30-3:45p.m. after 8:00p.m.	10:30-1:00p.m. after 3:30p.m.	After 1:30p.m.	After 6:00p.m.	Open
5	Sat.	After 11:00a	Not open	Open	Open	Open
6	Sun.	Open	Not open	Open	Open	Open
7	Mon.	12:00-1:00p.m. after 4:00p.m.	4:00-6:00p m.	11:30-12:30p.m. 3:30-4:30p.m.	After 6:00p.m.	After 4:00p.m.
8	Tue.	12:00-1:00p.m. 3:30-6:15p.m.	After 3:30p.m.	After 12:30p.m.	After 6:00p.m.	9:00-12:30p.m. after 4:00p.m.
9	Wed	After 4:00p.m.	3:30-6:00p.m.	9:00-9:45a.m. 12:30-2:00p.m. 4:00-5:30p.m.	After 6:00p.m.	After 3:30p.m.
10	Thurs.	After 1:00p.m.	3:30-6:30p.m.	9:00-9:45a.m. 12:30-1:30p.m. after 6:30p.m.	After 6:00p.m.	After 12:30p.m.
11	Fri.	9:00-9:45a.m. 12:00-4:00p.m. after 7:30p.m.	10:30-1:00p.m. 3:30-6.00p.m.	After 1:30p.m.	After 6:00p.m.	9:00-9:45p.m. after 12:30p.m.
12	Sat.	After 11:00a.m.	Not open	Open	Open	Open
13	Sun.	Open	Not open	Open	Open	Open
14	Mon.	12:00-1:00p.m. after 4:00p.m.	4:00-6:00p.m.	11:30-12:30p.m. 3:30-4:00p.m.	After 6:00p.m.	After 4:00p.m.
15	Tue.	12:00-12:45p.m. after 3:30p.m.	After 3:30p.m.	After 4:30p.m.	After 6:00p.m.	9:00-12:30p.m. after 4:00p.m.
16	Wed.	After 4:00p.m.	3:30-6:00p.m.	12:30-2:00p.m. 4:00-5:00p.m.	After 6:00p.m.	After 3:30p.m.
17	Thurs.	4:00-4:45p.m.	3:30-6:30p.m.	9:00-9:45a.m. after 3:30p.m.	After 6:00p.m.	After 12:30p.m.

Date	Day	Art Room	Auditorium	Dance Room	Game Room	Lounge
18	Fri.	9:00-9:45a.m. 12:00-4:00p.m. after 7:30p.m.	10:30-1:00p.m.	After 1:30p m.	After 6:00p.m.	9:00-9:45a.m. 12:00-1:00p.m..m. after 3:00p.m.
19	Sat.	After 12:30p.m.	Not open	Open	Open	Open
20	Sun.	Open	Not open	Open	Open	Open
21	Mon.	12:00-1:00p.m. 4:00-7:00p.m.	4:00-5:30p.m.	11:30-12:30p.m. 3:30-6:00p.m.	After 6:00p.m.	After 4:00p.m.
22	Tue.	12:00-1:00p.m. after 3:30p.m.	After 3:30p.m.	After 12:30p.m.	After 6:00p.m.	9:00-12:30p.m. after 4:00p.m.
23	Wed.	After 4:30p.m.	3:30-6:00p.m.	12:30-2:00p.m. 4:00-5:00p.m.	After 6:00p.m.	After 2:00p.m.
24	Thurs.	After 1:00p.m.	3:30-4:00p.m. after 8:00p.m.	9:00-9:45a.m. 12:30-1:30p.m. after 3:30p.m.	After 6:00p.m.	12:30-5:30p.m.
25	Fri.	9:00-9:45a.m. 12:00-4:00p.m. after 7:30p.m.	10:30-1:00p.m. 3:30-5:00p.m.	1:30-7:00p.m	After 6:00p.m.	9:00-9:45a.m. 12:00-1:00.m.m. after 3:00p.m.
26	Sat.	After 11:00a.m.	Not open	Open	Open	Open
27	Sun.	Open	Not open	Open	Open	Open
28	Mon.	Not open-holiday	Not open-holiday	Not open-holiday	Not open-holiday	Not open-holiday
29	Tue.	12:00-1:00p.m. after 6:30p.m.	After 6:30p.m.	12:30-2:30p.m. after 6:30p.m.	After 6:00p.m.	9:00-12:30p.m. after 4:00p.m.
30	Wed.	After 6:30p.m.	Not open	12:30-2:30p.m.	After 6:00p.m.	After 5:00p.m.
31	Thurs.	1:00-2:30p.m. after 6:30p.m.	After 8:30p.m.	9:00-9:45a.m. 12:30-1:30p.m. after 6:30p.m.	After 6:00p.m.	After 12:30p.m.

Appendix D

Senior Needs Assessment
Stakeholder Focus Group Survey Responses

Question / Response	# Responses
1. What are most important issues facing the City in servicing adults 55+?	
City Council needs revitalized	1
Creative writing & interactive discussion on social/cultural topics	1
Cultural & language sensitive services	2
Health Fair, exercise programs	2
Retirement housing	1
Senior Center - nutrition (ethnic menus) & activities	3
Services & training skills (ESL, communication, computer)	1
Transportation	1
2. What are most important services/programs currently provided?	
Blood pressure check-ups	2
Case manager -help in SSI, medical insurance, etc.	2
Citizenship classes	1
Housing	1
Nutrition programs	2
Outreach	2
Picnics, trips	2
Playing cards	2
Programs need updating - new ideas for all cultures	1
Transportation	1
3. What would be most important services/programs for the future?	
Add more counseling/discussion programs, nutrition, no-smoking, cultural diversity	2
Expand Senior Center, include Day Care and meals all in one building	2
Increase multi-culture training programs	1
Make Center more user friendly	1
Technology, access web page, email, internet	1
4. What are the best services provided by the City?	
Daily activities	1
Educational & entertaining videos, esp. travel	1
Health, i e. BP monitoring	2

Question / Response	# Responses
Meals/nutrition	4
Networking seniors	1
Outreach	2
Social activities	1
Transportation to Senior Center	1
5. How can the City improve in providing services to older adults?	
Exercise more control of Center	1
Make Senior Center more user-friendly, have services all in one building	2
Monthly/quarterly meeting between community social workers and seniors	2
Pre-screen individuals taking free programs	1
6. How do you envision future service delivery of adult programs?	
Combination City and non-profit	2
Other - give a "helping hand" program to benefit all	1
Other - Older Americans Act	1
Other-State funding	1
Private sector provides services	1
7. What services/programs will Baby Boomers desire in 10-15 years?	
Excursions, camping/sightseeing	1
Housing, include areas for health needs and recreation	2
Medical	1
Nutrition	1
Outdoor games	2
Perform a study of needs/demands	1
Programs should focus on needs of all groups	1
Transportation	1
8. What should be the City's #1 priority in meeting needs of older adults?	
Fair, equitable treatment that demonstrates dignity, respect, compassion	1
Housing	1
Increase meeting time for Indo-American community	1
More space to improve facility, include separate rooms for classes, each activity, indoor/outdoor games, chess game should be popularized	2
9. Are user fees for adult programs appropriate?	
Yes	4
No	

Appendix E

City of Milpitas
Senior Needs Assessment

Focus Group Notes - 8-14-01
Milpitas Senior Center

What are the Issues?

- Transportation to shopping, medical, public transit locations, church, social outings
  - Outreach service is limited and has strict requirements
  - Isolated seniors need to get out and socialize
  - Transportation from senior housing and residential areas to Senior Center and other locations.
- Bilingual instruction in ESL for all non-English speaking. Tutoring
- Health Education and clinics for testing hearing, eyes blood pressure etc. Health Aides/Equipment
- Assistance with home repair and access modifications
- Adult Day Care, respite for caregivers
- Case Management

How Can Services Improve?

- Nutrition Program needs more space to expand
  - Full Service on site kitchen to cook meals
  - Menus to represent cultures
- Fresh fruit/juice bar and coffee bar
- Group singing
- Craft classes
- Drawing
- Calligraphy
- Educational seminars
- Intergenerational experiences

- Classes in local history and citizenship
- After school care for youth
- Access to technology --computer education
- Wider range of services
  - Swimming
  - Walking
  - Yoga
  - Fitness
  - Adult sports leagues
  - Dances
- Cooperative programming with Terrace Garden or other organizations to provide social programs for all seniors in the community
- Cooperative marketing and promotion of all programs for seniors
- Affordable Senior Housing-one-bedroom units with laundry service on site and activity areas- Guest Units.

Envision Service for the future

- Services listed in previous question
- Weekend, evening and holiday hours for activities
- Opportunities for families to get together
- Fiber-optic cables for telecommunications to housing and public facilities for communications, Internet access
- More adventure excursions
- Lifelong Learning
  - Financial Planning
  - Entrepreneurship
- Plug–In for Exercise
- Seniors will live in their own homes longer
- In-fill development-higher density housing for all
- Transportation
  - BART Station
  - Light Rail
  - Shuttle service from homes to public transit locations

  - Private sector will have a role in transportation
  - Seniors will drive longer
  - Escort/chauffer service for seniors to social, medical and shopping
- Fee based services with sliding scale
- Public support still needed for meals and transportation
- Use of neighborhood schools for senior activities reduces transportation problems

How should the City respond?

- Tax Incentives for developers to meet housing and transportation needs
- Section 8 financing
- Use more volunteers
- Volunteer fundraising and investment programs for the Center
- Outsourcing for some services
- Cooperative programming/partnerships with other agencies: YMCA, Adult Education, churches, health care
- Consortium with other public agencies e.g. Housing Trust Fund
- City Volunteer Coordinator to visit corporations to meet with retiring employees to inform them of opportunities
- Tax measure–bond election for facilities

Appendix F

City of Milpitas
Senior Needs Assessment

Community Meeting Notes - 9-18-01
Milpitas Senior Center

Responses from the Public

What are the needs of 55+ adults in the following service areas?

Housing

- Community owned property
- Terrace Gardens
- Meals (5 days)
- Laundry services
- R.N.s on call
- Kitchen facilities in each unit
- Close to shopping center
- Parking
- Shuttle services
- Senior housing and information on housing
- Low income housing

Transportation

- Shuttle to Light Rail
- Outreach/Shuttle Van (Senior Activities)
- On time taxi and van service for frail seniors
- Better availability of translator at Outreach

Recreation and Community/Social Services

- New or rehab Senior Center
- Computers
- Energy efficient facilities
- Intergenerational activity
- Financial management
- Dancing
- Stage/drama
- Workshops
- Trips/travel
- Lunches/breakfast/dinner
- Aerobics
- Arts classes
- Card games
- Swimming
- Band and chorus
- After school recreation
- Medical services
- English and citizenship classes for all ethnic groups
- More social services (assistance with health benefits)

How can services improve in all these areas?

Housing

- More Units for 55+
- Community living
- Police protection
- Simplify paper work for housing applications

- Improve public information about housing availability (utilize media and Senior Newsletter)
- Applications for housing available at the Senior Center

Transportation

- Improve Outreach
- On time service
- Use another company
- Shuttle from home to public transit
- Shuttle to senior events not just medical

Recreation and Community/Social Services

- Expanded financial and legal services
- More assistance with health services
- Ethnic-specific Social Services
- Ethnic specific games and trips (leaders in native languages)
- Physical Exercise
- Workshops for males
- More space for larger classes
- See list above

Appendix G

City of Milpitas Senior Needs Assessment
Stakeholder Interview Summary

Question / Response	# Responses
1. What are the City's greatest strengths/assets in meeting needs of older adults?	
Accommodating different cultural groups	1
ADA vans	1
Adult School @ 1331 E. Calaveras	1
Availability/assistance with Social Services	1
Case manager, Senior Center	2
City subsidizes programs to keep low cost or free	1
Good partnership	1
Housing available	1
Nutrition programs	1
Proactive in funding subsidized transportation	1
Public information to seniors	1
Senior Center - active/good resource	3
Senior Center - works with non-profits	1
Senior Center location on bus line is good	2
Senior needs/cares are high priority with the City	3
Service #1	1
Supportive staff	1
Trying to identify needs	1
Very generous (50%) funding for nutrition	1
N/A	1
2. What are the City's weaknesses/challenges in meeting needs of older adults?	
Accommodating changing demographics	1
Adult day care	2
Caregiver/family support	2
City staff-turnover/internal organization/communication	1
Class capacity - seniors on waiting lists	1
Commercial kitchen for on-site cooking	1
Communication/language barriers	3
Coordinate/collaborate with other agencies	1
Housing-affordable independent living	4
Housing-assisted living	1

Question / Response	# Responses
Housing-planning for population growth	1
Lack of staffing/space-center over-used	2
Long term care	2
Need to quantify needs	1
Open space	1
Serving needs of multicultural aging population	3
Traffic	1
Transportation-taxis for disabled/trans to-from housing & City/Outreach no ID system/not on time	5
Mental Health Services	1
In Home Support -transportation difficult for workers	1
Lack of alternative forms of medicine for Eastern cultures	1
Multi cultural health prevention	1
Difficult for elder immigrants to access social services system	1
3. What are most critical issues in the next 10 years?	
Active pursuits-life-long learning, technology, young-old programs	2
Adult day care for old-old	1
Affordable housing	4
Assisted living	1
Balancing priorities for funding needs	1
Change image of Senior Center to attract boomers	1
Collaboration/communication/outreach to meet the needs/services, incl funding	3
Facility/funding for population growth	1
Jobs/housing for young so they can remain in community & support parents/seniors as they age	1
Translation Services to overcome language barriers	3
Loss of federal funding for Seniors	1
Preventive health for seniors	1
Quantifying/funding the needs	1
Serving low income immigrants	1
Support services, shopping, laundry, caretaker services	2
Transportation	2
Accessible Health Care	1
4. What changes in service delivery are envisioned for 2010?	
Access to technology-community facilities, housing/care facilities/training/use of web site community info/online classes	5
Adult care/respite care	1
Assisted living facility w/transportation to community facilities	1

Question / Response	# Responses
Business Plan approach - regional plan for Senior Services- projects that are replicable, costs, local can't compete	1
Caregiver services to bring seniors to Center	1
Changes in times for service - evenings/weekend activity	1
Creative collaboration-one stop agency - continuum	1
Dining - at capacity, access ramp	1
Greater need/demand for variety of services - more independent, different cultures	2
Regional or statewide planning to get money	1
Serving the home-bound	1
Sports Center-seniors swim/fitness--activity card or discount	2
Support/assistance to seniors, community services, i.e. shopping	2
Transportation - accessible (BART)	1
Transportation - escorted	1
Automation	1
Satellite programs	1
More preventive health programs	1
Adopt a Grandparent/intergenerational activities	2
More group support activities	1
5. What services will Baby Boomers want in 10-15 years?	
Alternative social activities, i.e not bingo	3
Ambience of facilities (non-institutional, courtyard)	1
Changes in times for service - evenings/weekend activity	1
Adult Day Care programs	1
Educational - life-long learning	3
Financial planning	2
Food/multicultural food choices in meal programs	2
Health/fitness, adaptive equipment, weight rooms, pools, classes	6
Housing	2
Inform before 55 about services	1
Marketing to working seniors	1
Medical care	1
More affluent - will be able to pay for services/programs	2
Not that big of change	1
Sophisticated consumer	1
Stress prevention/support for aging boomers who are caregivers	3
Technology/computers	3
Travel	1

Question / Response	# Responses
Use bilingual media	1
Volunteering-give back - link to needs, Tutoring for youth	2
Long Term Care Insurance	1
6. What is the City's top priority action?	
Adequate medical facilities	3
Food	1
Frail elderly - convenient services, outreach, day care	1
Housing-independent living, assisted, long-term nursing	6
Transportation	2
Full continuum of housing independent, assisted, long term care	1
7. How do you envision future service delivery?	
Combination City and non-profit organizations	3
Other collaboration of all the above, City/non-profit, private (churches will play a larger role)	5
8. Are user fees for older adult programs appropriate?	
Yes	3
No	0
Sliding scale, based upon income/expenses	6
Higher income should pay	2
Minimal-for some programs	1

Appendix H
Benchmark Survey Comparable Cities
Senior Needs Assessment

Survey Questions

Name of City _____ City Population _____

Contact Person _____ Phone _____

What is the 55 years and over population of your city?_____
(2000 Census Data if available)

1. Please check any of the following recreation and community services your City provides for adults 55 years and over and indicate if the City directly provides the service or contracts with another agency or non-profit organization to deliver the service.

Programs/Services	City Provides	Contract w/Agency	City Funding
Recreation programs, excursions and classes			
Health and Wellness programs and classes			
Meal programs			
Senior Assistance Programs			
Information and Referral			
Case Management			
Adult Day Care			
Other			
Other			

2. What is the annual operating budget for Senior Services offered by your City? _____

3. How many Full-Time Equivalent (FTE) staff positions are budgeted to provide senior services for your City? _____

4. What is the square footage of City-owned, dedicated space for Senior/ Adult programs and services?

_____

5. Please list any other public or private facilities that are utilized for City sponsored senior services.

_____
_____
_____

6. Please estimate the number of people served **monthly** (unduplicated) by the following programs or services.

Program/Service	**Estimated Users/Participants (Unduplicated)**
Recreation Programs and Activities	
Nutrition/Meals Program	
Adult Day Care	
Information and Referral	
Case Management	
Health and Wellness Programs	
Senior Assistance Programs (legal aide, home repair etc.)	
Other	
Other	

7. Has your City participated in the development of Senior Citizen housing ? ❒ yes ❒ no
   If yes, please respond to the following questions.

8. How many subsidized Housing Units are designated by the City for Seniors? City?

   Number of Rental Units _____
   Number of For Sale Units _____

9. How many units are planned or under construction?

   Rental Units _____
   For Sale Units _____

10. What has been your City's level of involvement? Check all that apply.

   ❒ Full Funding
   ❒ Partial Funding
   ❒ Developer Incentive Agreement/ Waiver of development fees
   ❒ Dedication of Land
   ❒ Public/Private Partnership
   ❒ Tax Credits
   ❒ Other _____
   ❒ Other _____

11. What source(s) of funding has the City used for financing Senior Housing?

_____

12. Please check any of the following Subsidized Transportation Service your City provides for adults 55 years and over and indicate if the City directly provides the service or contracts with another agency or non-profit organization to deliver the service.

Programs/Services	City Provides	Contract w/Agency	City Funding	Monthly # of rides
Paratransit (Outreach)				
Shuttle/Minibus				
Public Transit				
Other				
Other				

Additional Comments _____

_____

Appendix I
Benchmark Survey Comparable Cities
Data Tabulation from Survey Responses

	Milpitas	Fremont	Mountain View	Palo Alto	San Jose	Santa Clara	Sunnyvale
Section 1 - City Population							
Population Total	62,698	203,413	70,708	58,598	894,943	102,361	131,760
Population 55 +	9,136	32,553	12,542	14,956	141,793	18,434	24,494
% of 55 +	15%	16%	18%	26%	16%	18%	19%
Section 2 - Recreation & Community Services Provided	x = Programs Offered and Funded	x = Programs Offered and Funded	x = Programs Offered and Funded	x = Programs Offered and Funded	x = Programs Offered and Funded	x = Programs Offered and Funded	x = Programs Offered and Funded
1. Programs/Services	City Contract Funded	City Contract Funded	City Contract Funded	City Contract Funded	City Contract Funded	City Contract Funded	City Contract Funded
Recreation, excursions, classes	x x	x x	x	x Avenidas	x x	x x rec prog	x x
Health & wellness, programs, classes	x x	x x x	x	Avenidas	x x	x partial	x x
Meal programs	$63,163	x x	x	La Comida$32,733	x x	x x $17,175	x $21,342
Senior assistance programs	x x	x x x	x	Avenidas $8,280	x x	x partial/Fed	x x
Information and referral	x x x	x x	x	Avenidas	x x	x x	x $10,095
Case management	x x	x x	x	Avenidas	x x	x 1/3 Title3 $5,000	x
Adult day care		xBACS x	x	Avenidas		x $5,000	x
Other - peer counseling		x x		Avenidas		x x	
Other - Ombudsman						x $6,150	x $10,869
				*See End Note re Funding			
2. Total City Operating Budget	$ 105,331,006	$ 120,500,000	$ 176,706,717	$ 125,766,000	$ 1,501,141,144	$ 365,534,066	$ 214,867,460
Annual Operating Budget-Senior Services	$ 567,646	$ 1,000,000	$ 224,479	$ 440,300	$1,000,000	$ 520,451	$ 515,000
% of Total City Budget	0 54%	0 83%	0 13%	0 35%	0 07%	0 14%	0 24%
Cost per Capita	$ 9 05	$ 4 92	$ 3 17	$ 7 51	$ 1 12	$ 5 08	$ 3 91
Cost per Capita 55+	$ 62 13	$ 30 72	$ 17 90	$ 29 44	$ 7 05	$ 28.23	$ 21 03
3. Number of budgeted FTE staff positions	7	21	2 5	<oneFTE	50	6	5
Residents 55+ per Employee	1,305	1,550	5,017	N/A	2,836	3 072	4,899
4. Square footage of dedicated space for Senior Center	9,000 sq ft	12K sq ft , 2nd sr ctr in des gn phase planned at 16K sq ft 28 sq ft total	25,000sq ft	17,800 sq ft Owned by City, Run by non-profit w/long term lease	150,000 sq ft city-wide	18K sq ft +	23K sq ft
Square Foot per Captia 55+	1	0 86	1 99	1 19	1 06	1	0 94
5. Other public/private facilities used for Services	Sports Center, Community Center	Sr Ctr office space for counseling, case mgmt & program staff also at Admin Bldg on Capitol Ave		Community Centers		City swimming pools, senior swim programs, lawn bowl facility	Sunnyvale Community Center, Columbra Middle School, NOVA Learning Lab
6. Estimated # of people served monthly					For Berryessa Program		
Recreation programs/activities	2600	6312	1700	200	420	approx 1500	2026
Nutrition/meals program	1800	100	100	50	300	98	60
Adult day care	16-18					3	NA
Information/referral	85-90	1 000/year	50		400	60	94
Case management	28-30	~550/year			5	35	NA
Health/wellness programs	23-25	303			150	150	74
Senior assistance programs	60	52			70	20	41
Other Project Match							31per year
Other Ombudsman							77

Appendix I
Benchmark Survey Comparable Cities
Data Tabulation from Survey Responses

	Milpitas	Fremont	Mountain View	Palo Alto	San Jose	Santa Clara	Sunnyvale
Section 3 - Housing Programs							
7. City participation in Senior Housing development							
Yes	x	x	x	x	x	x	x
No							
8. Number of subsidized senior housing units?							
# rental units	234	250	595	489	1954	480	57
# for sale units				0	0		
Existing Units per Capita 55+	0 026	0 008	0 047	0 033	0 014	0.026	0 002
9. Number of units planned/under construction?							
# rental units	80	50 (deaf seniors)	120*	0	1029	100	150
# for sale units				0	0		
Existing and Planned Units per Capita 55+	0.04	0 01	0 06	0 03	0 02	0 03	0 01
J. City's level of involvement?							
Full funding	x Terrace Gardens						
Partial funding	x	x	x	x	x	x	x
Developer incentives/fee waiver	x						
Dedication of land		x	x				
Public/private partnership	x	x			x	x	
Tax credits	x						
Other		HUD 202 program	Negotiate w/owners for sale of properties			Bonding Authority	
Other							
11. Senior housing funding sources	Redevelopment 20% set aside, CDBG, General Fund, Tax Increment, Revenue Bonds	CDBG Redevelopment Housing Fund, Home, HUD 202 program	CDBG and Home Plus Revitalizaion Housing set aside funds	CDBG, City housing trust funds from housing fees on commercial projects	Redevelopment 20% tax increment, Federal HOME Investment Partnership Program	Redevelopment Agency,Federal Home Funds	CDBG-Crescent Terrace HOME Project Match
Section 4 - Subsidized Transportation							
12. Subsidized Transportation Services Offered*	*City Contract Funds*	*City Contract Funds*	*City Contract Funds*	*City Contract Funds*	*City Contract Funds*	*City Contract Funds*	*City Contract Funds*
Paratransit	x $28,700	x x	x $15,836	x $6,180	x $46,000	x $58,700	x $20,080
Shuttle/Minibus				x			
Public Transit	x						
Other							
Other							
Avg Number of monthly one way rides	1,496 Outreach 190,000 Transit	>800	400 Outreach	2,816 Outreach * 2200	36,810 Outreach	5,651Outreach	*3,724 Outreach* 360 Transit
City subsidy of Paratransit Fare ($2 50)	$1 70 per ride		$2 50	$2 50	$0 35	$1 20	$1.10
13. Additional comments				One of the city's two local shuttle routes was designed to serve several sr housing facilities & Sr Ctr *			

* All Santa Clara County cities contracted with VTA for Paratransit Several cities used CDBG funds to subsidize paratransit Mtn. View and Palo Alto fund the full cost of Outreach @$2 50 Palo Alto provides a cross-town shuttle service to senior *facilities and residential areas.*

*The City of Palo Alto has an operating agreement with Avenidas to provide porgrams The city funds approximately 14% of the non-profit organization's budget It also provides a senior center through a long term lease to the organization.

Appendix J
Comparison of Senior Services by Benchmark Cities Survey Responses

	Milpitas		Fremont		Mountain View		*Palo Alto		San Jose		Santa Clara		Sunnyvale	
Programs/Services	City Provided	Non-City Provided	City Provided	Non-City Provided	City Provided	Non-City Provided	City Provided	Non-City Provided	City Provided	Non-City Provided	City Provided	Non-City Provided	City Provided	Non-City Provided
Access to Training/Use of Computer Technology		x			x			x	x		x		x	
Adult Day Care		x				x		x		x	x	x		
Adult Education		x				x		x	x		x		x	
Affordable Housing	x					x	x		x		x	x		
Arts/Crafts	x				x		x	x	x		x		x	
Caregiver Support/Respite Care		x				x		x		x	x	x		
Care Management and Family Support	x					x		x	x		x			
Excursions Classes	x					x		x	x		x		x	
Financial Counseling	x					x		x	x				x	
Food/Nutrition Program	x					x		x	x		x	x	x	
Health and Wellness Programs	x					x		x	x		x		x	
Health Insurance Counseling	x					x		x		x	x		x	
Home Care/Nursing		x				x		x		x	x			
Housing Services	x					x		x	x		x	x		
Immigration Counseling	x					x		x		x				
Information/Referral	x				x			x	x		x		x	
Legal Services		x				x		x	x		x	x	x	
Lifelong Learning Programs	x					x		x	x				x	
Meals on Wheels		x				x		x		x		x		
Mental Health Services		x				x		x		x	x			
Recreation Programs	x				x		x	x	x		x	x	x	
Senior Assistance Programs	x					x		x	x		x	x	x	
Transportation	x	x				x	x			x	x	x		
Volunteer Program	x				x			x	x		x		x	
Weekend/Evening Progams					x			x	x		x	x	x	

*The City of Palo Alto has an operating agreement with Avenidas to provide programs

City Services Services that are provided by City Staff

Non City Services Services contracted with outside agencies or consultants

Note Services may or may not be provided at City facilities