

**APPROVED**  
BY THE CITY COUNCIL

**FEB 23 1999**

OFFICE OF THE  
CITY CLERK



1.13

NEIGHBORHOODS, PLANNING  
AND DEVELOPMENT SERVICES  
DEPARTMENT

OFFICE OF HUMAN SERVICES

CITY OF SACRAMENTO  
CALIFORNIA

6005 FOLSOM BOULEVARD  
SACRAMENTO, CA  
95819-4613  
FAX: (916) 277-6074  
(916) 277-6005

February 8, 1999

City Council  
Sacramento, California

Honorable Members In Session:

**SUBJECT:** ETHEL MacLEOD HART TRUST FUND  
PROJECT ALLOCATION

**LOCATION:** City-Wide

**RECOMMENDATION:**

This report recommends that the City Council, by resolution, approve various projects for funding from the Ethel MacLeod Hart Trust Fund for Senior Citizens and amend the Capital Improvement Program by appropriating \$58,560 from the Trust Fund.

**CONTACT PERSON:**

Alan Boyd, Superintendent, Office of Human Services, 277-6077  
Rosanne Bernardy, Senior Citizens Services Supervisor, 277-6007

**FOR COUNCIL MEETING OF:** February 23, 1999

**SUMMARY**

This report identifies various additional projects to be funded from the Ethel MacLeod Hart Trust Fund for Senior Citizens for the five-year allocation period from 1996-2000.

### **COMMITTEE ACTION**

The Ethel MacLeod Hart Advisory Committee reviewed and approved these projects for funding at their December 7, 1998 and January 11, 1999 meetings.

### **BACKGROUND**

The Statement of Purpose and Guidelines for the Ethel MacLeod Hart Advisory Committee, as approved by the City Council, provides for the five-year allocation process for the identification and recommendation of projects to be funded from the E.M. Hart Trust Fund for Senior Citizens. Projects to be funded are to be city sponsored and/or operated facilities, projects or services. The funds may be for a variety of projects and/or programs, but may not be utilized for ongoing operations. The Mayor appointed Advisory Committee reviews the proposed projects and makes appropriate recommendations to the City Council.

The five new projects proposed for funding are as follows:

- A Start-up of 50+ Wellness Program Newsletter:** Project funds (\$13,860) will be used to print and mail the first nine issues of a bi-monthly newsletter focusing on healthy lifestyles for Sacramentans age 50 and above. (Attachment A)
- B Expansion of A.R.M.S. Program (Assistance, Referral and More for Seniors):** Project funds (\$10,000) will be used to establish a volunteer component of this information and assistance program so as to allow for the expansion of the program to various locations throughout the community. (Attachment B)
- C Caring Neighborhoods Project Support:** Project funds (\$2,500) will be used to provide start-up stipends to neighborhood groups that commit to establishing a project whereby residents work together to help their elderly and disabled neighbors remain living independently in their homes. \$500 stipends will be available to five neighborhood groups. (Attachment C)
- D Coordination of Sacramento's International Year of Older Persons:** 1999 has been designated by the United Nations and the World Health Organization as the International Year of Older Persons and Healthy Aging. Project funds (\$20,000) will be used by the Older Adult Services section to serve as the lead agency in a community-wide, year-long effort resulting in a wide ranging schedule of events that explore and highlight all aspects of the aging process and of older people. (Attachment D)
- E Hart Senior Center Upgrades:** Project funds (\$12,200) will be used for a variety of interior upgrades including upholstering lobby furniture, replacement of worn carpet and repainting a section of the facility.

**FINANCIAL CONSIDERATIONS**

The financial investment strategy for the Trust Fund is to allocate funds in five-year periods utilizing the accumulated interest from the permanent endowment fund. It is anticipated that the endowment will generate a minimum of \$400,000 each five years. There will be \$172,108 remaining for allocation during the current allocation period (1996-2000) after approval of the the projects recommended in this report. The permanent endowment fund is currently approximately \$1.9 million dollars.

**ENVIRONMENTAL CONSIDERATIONS**

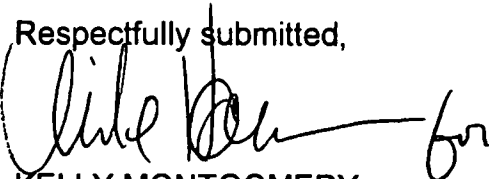
Not applicable.

**POLICY CONSIDERATIONS**

The allocation of funds to the designated projects is consistent with the Council's direction in establishing the Trust Fund and the Advisory Committee which is consistent with the Statement of Purpose and Guidelines and the intent of Mrs. Hart's bequest. The utilization of the Trust Fund furthers the Council's goal of improving access to public services and facilities and in reaching out to various neighborhoods and targeted populations.

**MBE/WBE EFFORTS:**

City guidelines will be used as applicable to each project.

Respectfully submitted,  
  
KELLY MONTGOMERY  
Director, Area 4

**RECOMMENDATION APPROVED:**



WILLIAM H. EDGAR  
City Manager

**ETHEL MacLEOD HART TRUST FUND  
PROJECT ALLOCATION - FEBRUARY 1999**

**PROJECT:** 50+ Wellness Program Newsletter  
**LOCATION:** City-wide  
**FUNDING REQUIRED:** \$13,860

**PROJECT DESCRIPTION**

**PROGRAM OVERVIEW**

The mission of the Older Adult Services unit's 50+ Wellness Program is to encourage and promote health and vitality through the aging process with the ultimate goal being the reduction and prevention of the debilitating diseases so common among aging adults. The 50+ Wellness Program offers a wide variety of health and fitness related programs, targeted at people age 50 and above who are relatively healthy and are working to stay that way. The Program Coordinator also works closely with other agencies to increase the number of wellness opportunities available to seniors in Sacramento.

The proposed 50+ Wellness Newsletter will be a bi-monthly publication which will:

- Publicize programs and upcoming events offered by the 50+ Wellness Program, such as Senior Games (Winter and Summer), dances, Senior Camp, exercise classes at various locations, sports clinics and tournaments, seminars, and in-home exercise programs;
- Provide information on programs, services, and events offered by others in the community pertaining to health and wellness for the 50+ population;
- Highlight local agencies and organizations involved with health and wellness for seniors to increase public awareness of available resources;
- Include in-depth articles on topics related to health and wellness from all perspectives;
- Include a calendar of wellness-related community events in Sacramento.

It is proposed that the Hart Trust Fund sponsor the "kick-off" of this new publication, to include nine issues over a 18 month period. Four thousand (4,000) copies of each issue will be produced, 2,500 of which will be mailed directly to seniors homes and to other organizations. 1,500 copies will be made available for pick up at community centers and other appropriate locations throughout Sacramento.

**APPROVED**  
BY THE CITY COUNCIL

**FEB 23 1999**

OFFICE OF THE  
CITY CLERK

**RESOLUTION NO.**

99-073

**ADOPTED BY THE SACRAMENTO CITY COUNCIL**

ON DATE OF \_\_\_\_\_

**RESOLUTION APPROVING PROJECTS TO BE FUNDED FROM THE  
ETHEL MacLEOD HART TRUST FUND FOR SENIOR CITIZENS  
AND AMENDING THE FY 1998-99 CAPITAL IMPROVEMENT BUDGET**

**BE IT RESOLVED BY THE COUNCIL OF THE CITY OF SACRAMENTO THAT:**

1. The following projects are approved for funding from the Ethel MacLeod Hart Trust Fund for Senior Citizens:

- |   |            |
|---|------------|
| A. 50+ Wellness Newsletter              | \$ 13,860. |
| B. ARMS Program Expansion               | \$ 10,000. |
| C. Caring Neighborhoods Project Support | \$ 2,500.  |
| D. International Year of Older Persons  | \$ 20,000. |
| E. Hart Senior Center Interior Upgrades | \$ 12,200. |

2. The FY 1998-99 Capital Improvement Budget (561-500-KB36) is amended to reflect an increase of \$58,560 for purposes of funding the above projects.

\_\_\_\_\_  
MAYOR

ATTEST:

\_\_\_\_\_  
CITY CLERK

\_\_\_\_\_  
**FOR CITY CLERK USE ONLY**

RESOLUTION NO: \_\_\_\_\_

DATE ADOPTED: \_\_\_\_\_

The kick-off issues of this new publication will be used in the solicitation of long-term sponsors of the publication. Potential sponsors include businesses in the areas of health, wellness and aging interested in having their name associated with a wellness publication reaching thousands of local seniors. It is anticipated that sponsorship for the total cost of the publication will be available following a kick-off period.

### NEED

Although information on healthy aging and programs which promote fitness and healthy lifestyles are abundant, most local seniors are unaware of them and how to access them. The 50+ Wellness newsletter will serve as a "one-stop-shopping" source of information for Sacramento seniors interested in healthy aging.

### FUNDING REQUIREMENTS

The cost of printing 4,000 copies and mailing 1,500 copies of each issue of the 4-page newsletter will be \$1,540. The total project cost for the printing and distribution of the nine issues over the 18-month kick-off period totals \$13,860.

### CONFORMANCE TO GUIDELINES

- **Suitable and prominent recognition of Mrs. Hart will be made on all uses of the Trust Fund (Section VII D).**

Each issue of the Wellness newsletter will note that it has been funded by the Trust Fund.

- **Supplements City and other funding resources and does not replace those sources (Section VII F).**

Current budgetary limitations do not allow for the publication and distribution of such a publication.

- **Is responsive to the mission and purpose of the City in providing services to the senior population (Section VIII - preamble).**

The project addresses the City's commitment to taking preventive measures to help Sacramento's seniors remain healthy and active as outlined in the Program Development Plan for Older Adults.

- **Is responsive to senior residents in all neighborhoods of the City (Section VII B-1).**

The publication will be distributed city-wide.

**ETHEL MacLEOD HART TRUST FUND  
PROJECT ALLOCATION - FEBRUARY 1999**

**PROJECT:** Expansion of Arms Program

**LOCATION:** City-wide

**FUNDING REQUIRED:** \$10,000

**PROJECT DESCRIPTION**

**PROGRAM OVERVIEW**

ARMS (Assistance, Referral, and More for Seniors) serves seniors needing help accessing information and arranging for service within the areas of housing, Medicare, Social Security, etc. Clients tend to need intensive episodic assistance, without on-going case management. Currently, most ARMS services are provided out of the Hart Senior Center. Many seniors from throughout Sacramento could benefit from this program, and yet are unaware of it or unable to access it.

**NEED**

It is proposed that a volunteer component of the ARMS program be established. Volunteers will be recruited from the community, thoroughly trained to provide information and assistance to seniors, and then placed in community centers and other appropriate locations throughout the City to meet with seniors in need of this type of service. It is anticipated that the establishment of this component will enhance the program by: 1) increasing the number of ARMS counselors and thereby increasing the number of seniors served; 2) giving people interested in helping others an opportunity to do so and the training to do it effectively; 3) freeing up the current ARMS Coordinator from some of the direct service work that she performs so that she can promote and publicize ARMS throughout Sacramento.

**FUNDING REQUIREMENTS**

Tentative arrangements have been made with InfoLine to have ten volunteers trained in each of three years on providing information and assistance to seniors. In addition four copies of the Community Services Directory on computer disk will be purchased, with updates for each of the three years. The directories on disk will be used by volunteers throughout the community on laptop computers. The cost of the three-year start up for the volunteer component is as follows:

Training for volunteers each yr. at \$500/year	\$1,500
4 copies of Directory on disc, w/ upgrades for 2 yrs	\$2,100
3 laptop computers	\$5,400
Promotion and miscellaneous expenses	<u>\$1,000</u>
<b>TOTAL</b>	<b>\$10,000</b>

## CONFORMANCE TO GUIDELINES

- **Used for appropriate operational and programmatic services for senior citizens (Section VII E).**

The project provides for a service for senior citizens that will enhance their comfort and enjoyment.

- **Supplements City and other funding resources and does not replace those sources (Section VII F).**

Resources are not available in the budget for the establishment of a volunteer component of ARMS

- **Is responsive to senior residents in all neighborhoods of the City (Section VII B-1).**

The establishment of a volunteer component of ARMS would enable us to be more responsive to seniors in all areas of Sacramento.

- **Provides seed funding of new projects (Section VII 5-d)**

The funding for the establishment of the volunteer component of ARMS will be three years in duration.



**ETHEL MacLEOD HART TRUST FUND  
PROJECT ALLOCATION - FEBRUARY 1999**

**PROJECT:** Caring Neighborhood Project Start-up Stipends

**LOCATION:** City-wide

**FUNDING REQUIRED:** \$2,500

**PROJECT DESCRIPTION**

**PROGRAM OVERVIEW**

The intent of the Caring Neighborhoods Program is to encourage neighborhood residents and organizations to be more aware of and responsive to the needs of their frail elderly and disabled neighbors. Caring Neighborhoods is similar to Neighborhood Watch, but instead of focusing only on crime, residents look out for the general well-being of their neighbors who may need some assistance to remain independent in their homes. Caring Neighborhoods program staff work with participating groups to develop a program that meets their neighborhood's special characteristics, capabilities and needs. The Caring Neighborhoods Program is a partnership with the Community Services Planning Council, the County Adult and Aging Commission with support from Sacramento County's new Experience Corps for Independent Living. Currently the following organizations are sponsoring Caring Neighborhoods efforts: Freeport Renovation on the Move; Oakridge Drug Free Zone; 42<sup>nd</sup>. Street Neighborhood Association; Franklin Area Group and the St. Andrews AME Church;

**NEED**

Many residents of Sacramento are concerned about the well-being of their elderly and disabled neighbors and want to help. Working together in an organized fashion with other well-meaning residents through a Caring Neighborhoods project is one way to make a difference. Providing financial resources to support the activities associated with getting a project off the ground is not an option for residents in many neighborhoods. The expenses associated with such activities may include copying and mailing costs; refreshments at meetings; and supplies and equipment needed to provide assistance to their neighbors in need.

**FUNDING REQUIREMENTS**

It is proposed that up to \$500 in one-time funds be made available to individual neighborhood based organizations that have committed to the Caring Neighborhoods concept. Funds will be allocated by the Caring Neighborhoods Program Coordinator as expenses are incurred by each group.

## CONFORMANCE TO GUIDELINES

- **Used for appropriate operational and programmatic services for senior citizens (Section VII E).**

The project provides for a service for senior citizens that will enhance their comfort and enjoyment.

- **Supplements City and other funding resources and does not replace those sources (Section VII F).**

The granting of funds to neighborhood groups is not allowable in the City's General Fund budget.

- **Is responsive to senior residents in all neighborhoods of the City (Section VII B-1).**

Caring Neighborhoods projects are encouraged in all areas of Sacramento and any group which commits to the project would be eligible for funds.

- **Provides seed funding of new projects (Section VII 5-d)**

The Caring Neighborhoods projects initiated in each participating neighborhood are separate and unique and require separate funds.

**ETHEL MacLEOD HART TRUST FUND  
PROJECT ALLOCATION - FEBRUARY 1999**

**PROJECT:**                    **Coordination of International Year of Older Persons**

**LOCATION:**                    **City-wide**

**FUNDING REQUIRED:**   **\$20,000**

**PROJECT DESCRIPTION**

**PROGRAM OVERVIEW**

1999 has been designated the International Year of Older Persons by the United Nations and the Year of Healthy Aging by the World Health Organization. Many communities and organizations across the country are planning events and activities to commemorate the year and to highlight the on-going accomplishments of older people. A year round schedule of "happenings" that explore and highlight all aspects of aging and older people in a variety of arenas (e.g. the workplace, social services, the arts, health and fitness, volunteerism, etc. ) and involve a cross section of the community are possible.

In order to assess the community's interest in this opportunity, City of Sacramento staff recently called a meeting which drew over 50 people representing a variety of organizations. The gathering generated tremendous enthusiasm and four subcommittees were established for ongoing work on the project. The group concluded that the coordination of community-wide efforts by a large number of organizations would be difficult without an agency taking the lead. It is proposed the City of Sacramento Older Adult Services take on this important role.

**NEED**

The coordination of Sacramento's International Year of Older Persons programs will require a part-time Program Coordinator, resources for marketing and promoting the year-long schedule of events and some general miscellaneous support.

**FUNDING REQUIREMENTS**

Program Coordinator	\$12,000
Marketing and Promotion	\$ 5,000
Miscellaneous Support	<u>\$ 3,000</u>
Total Cost	<u>\$20,000</u>

CONFORMANCE TO GUIDELINES

- **Is responsive to senior residents in all neighborhoods of the City (Section VII B-1).**

The International Year of Older Persons events and programs will be conducted throughout the community.

- **Suitable and prominent recognition of Mrs. Hart will be made on all uses of the Trust Fund (Section VII D).**

Promotional materials used throughout the International Year of Older Persons will make note that coordination of the year's events is support by the Hart Trust Fund.

- **Supplements City and other funding resources and does not replace those sources (Section VII F).**

Current budgetary limitations do not allow for this type of project.

- **Appropriate projects for funding include one-time projects and/or programs (Section VIII-B-5a)**

Coordination of the Sacramento community's response to the International Year of Older Persons provides a one-time opportunity to highlight older people community-wide and in a meaningful way.

**ETHEL MacLEOD HART TRUST FUND  
PROJECT ALLOCATION - FEBRUARY 1999**

**PROJECT:** Hart Senior Center Upgrades  
**LOCATION:** Hart Senior Center, 27th and J Street  
**FUNDING REQUIRED:** \$12,200

**PROJECT DESCRIPTION**

**PROGRAM OVERVIEW**

The Ethel MacLeod Hart Senior Center is a heavily used facility with an unusual amount of wear and tear due to the use of wheelchairs and walkers, and due to the fact that it is open to the public seven days and most evenings each week. Hundreds of seniors and members of the general public use the facility each day.

A recent survey of the Center's users show that people ranging in age from 50 to 90+ come from throughout the city to access services and participate in activities at the Center (the majority of respondents report living three or more miles from the facility). Hart Senior Center offerings include several unique programs such as Triple "R" Adult Day Service; SeniorNet Computer Learning Center; and others.

**NEED**

The wear and tear of heavy use has taken its toll on the interior of the facility. The four areas that currently need attention are:

- Upholstering of lobby furnishings
- Replacement of carpet in reception and office areas
- Replacement of floor covering in kitchen
- Repainting walls and doors in lobby

Although each of the items warrants attention because of being well worn or, in the case of the kitchen floor, having been damaged beyond repair, the Older Adult Services unit's budget does not currently allow the work to be done. Maintaining the facility in good repair is an important factor in creating an atmosphere that is welcoming and enjoyable for seniors.

FUNDING REQUIREMENTS

The following total costs are associated with the four projects in need of attention:

Upholstering of lobby furnishings	\$ 5,900
Replacement of kitchen floor covering	\$ 1,800
Replacement of carpeted areas of the facility	\$ 2,700
Repainting of the lobby	<u>\$ 1,800</u>
Total cost of facility upgrade	\$12,200

CONFORMANCE TO GUIDELINES

- **Fund utilization will include the expansion, rehabilitation, and refurbishing of existing facilities for senior citizens (Section VII B)**

The project involves the rehabilitation and refurbishing of the existing Hart Senior Center.

- **Suitable and prominent recognition of Mrs. Hart will be made on all uses of the Trust Fund (Section VII D).**

The facility has already been renamed in honor of Mrs. Hart. The proper maintenance of the facility will further honor her memory.

- **Supplements City and other funding resources and does not replace those sources (Section VII F).**

Current budgetary limitations do not allow for this type of maintenance to the facility.

- **Is responsive to senior residents in all neighborhoods of the City (Section VII B-1).**

The Hart Center is the sole senior center operated by the City of Sacramento and caters to older residents from throughout the city.

NPDS 471)





30313

ym

1958

Handwritten header text, possibly a title or date.

Handwritten text on the left side of the page.

Handwritten	Handwritten	Handwritten	Handwritten
Handwritten	Handwritten	Handwritten	Handwritten
Handwritten	Handwritten	Handwritten	Handwritten
Handwritten	Handwritten	Handwritten	Handwritten
Handwritten	Handwritten	Handwritten	Handwritten
Handwritten	Handwritten	Handwritten	Handwritten
Handwritten	Handwritten	Handwritten	Handwritten

Handwritten text at the bottom center.

Handwritten text at the bottom of the page, possibly a signature or date.



31:3

COACH 211/11

Handwritten notes or signatures, possibly including the word "Handwritten" and a date "1911".

**RESOLUTION NO.**  
**ADOPTED BY THE SACRAMENTO CITY COUNCIL**

ON DATE OF \_\_\_\_\_

**RESOLUTION APPROVING PROJECTS TO BE FUNDED FROM THE  
ETHEL MacLEOD HART TRUST FUND FOR SENIOR CITIZENS  
AND AMENDING THE FY 1998-99 CAPITAL IMPROVEMENT BUDGET**

**BE IT RESOLVED BY THE COUNCIL OF THE CITY OF SACRAMENTO THAT:**

1. The following projects are approved for funding from the Ethel MacLeod Hart Trust Fund for Senior Citizens:

- A. 50+ Wellness Newsletter \$ 13,860.
- B. ARMS Program Expansion \$ 10,000.
- C. Caring Neighborhoods Project Support \$ 2,500.
- D. International Year of Older Persons \$ 20,000.
- E. Hart Senior Center Interior Upgrades \$ 12,200.

2. The FY 1998-99 Capital Improvement Budget (561-500-KB36) is amended to reflect an increase of \$58,560 for purposes of funding the above projects.

\_\_\_\_\_  
MAYOR

ATTEST:

\_\_\_\_\_  
CITY CLERK

\_\_\_\_\_  
**FOR CITY CLERK USE ONLY**

RESOLUTION NO: \_\_\_\_\_

DATE ADOPTED: \_\_\_\_\_

**RESOLUTION NO.**  
**ADOPTED BY THE SACRAMENTO CITY COUNCIL**

ON DATE OF \_\_\_\_\_

**RESOLUTION APPROVING PROJECTS TO BE FUNDED FROM THE  
ETHEL MacLEOD HART TRUST FUND FOR SENIOR CITIZENS  
AND AMENDING THE FY 1998-99 CAPITAL IMPROVEMENT BUDGET**

**BE IT RESOLVED BY THE COUNCIL OF THE CITY OF SACRAMENTO THAT:**

1. The following projects are approved for funding from the Ethel MacLeod Hart Trust Fund for Senior Citizens:

A. 50+ Wellness Newsletter	\$ 13,860.
B. ARMS Program Expansion	\$ 10,000.
C. Caring Neighborhoods Project Support	\$ 2,500.
D. International Year of Older Persons	\$ 20,000.
E. Hart Senior Center Interior Upgrades	\$ 12,200.

2. The FY 1998-99 Capital Improvement Budget (561-500-KB36) is amended to reflect an increase of \$58,560 for purposes of funding the above projects.

\_\_\_\_\_  
MAYOR

ATTEST:

\_\_\_\_\_  
CITY CLERK

NPDS 471