

DIRECTOR'S REPORT

Heather M. Munroe, Director of Senior Services

Prepared for: January 21, 2021

ADMINISTRATION

Snow Policy

The snow policy that we had in play became a question of concern this week, when we realized that “we” close if the schools “close,” only we are now in a new era and the schools will almost never “close,” they will go remote, and may not even use the same standards that they once did to close. I have reached out to Jamie at the Library, Matt at Recreation, and Dave at the DPW. After multiple emails, calls, and policy reviews, I would recommend that based on our current limited access to the building, that we take a more case-by-case approach and consider all factors, starting with safety and the DPW recommendation into consideration, rather than whether the school is “closing.”

New Members

From July 1st through current day, we have added around 100 new members to our database. We will work internally with our team to find a way to start outreaching to our in-town members to stay in contact with them over their first year of membership and keep them informed of our services and answer any questions they may have. We will also explore the opportunity and interest in starting a new members group on zoom. We are continuing to send new member welcome packets to all residents.

Veteran's Outreach

In a virtual meeting with the Veteran's Service Officer, Nancy, we discussed sending out a joint packet from the COA/Veteran's services to all of the veteran's in town over the age of 60 to make sure that they are aware of the services that we offer. Nancy's numbers indicate that there are over 530 veteran's in Wellesley that are over the age of 60. We will be putting the materials together and getting them to Nancy for mailing by the Veteran's office.

Parking Lot – Berms

The berms in the parking lot were damaged during our winter season. After contacting the FMD and DPW, the berms were repaired the same day and look great.

COVID-19 UPDATES

Hot Meal Delivery

Since last meeting, we have provided a total of 141 meals in December. We continue to average 28 meals a week, with a few recipients being added and a few coming off of the list. January's starting balance of approximately \$14k.

We will begin internal discussions this month of whether we have a way and means to expand this program, to residents who are interested in paying for the program.

Staffing Adjustments due to State's 25% Occupancy Changes

With the Governor's announcements and more office space restrictions that took place on December 28th, we worked with Board of Health and the Town to make sure that we are in compliance. We amended our Phase III plan from earlier in December to include stricter requirements that all in office staff have a contained space with a door while working on site. Simultaneously, we have updated the transportation policy to reduce the number of riders from 3 households to two people.

As a result, we have worked with IT to add network cables to the conference room, American Legion, and Arts & Crafts room. In addition, we now have two enclosed offices with a dual setup (Harddrive and Surface) and four closed door locations where we can connect a surface to the network.

We have also updated most office phones in the building to ring when the main line rings, which expands our ability to place staff in multiple rooms.

See Attachment 1- COVID19 Phase III – Revised December 28 2020 Plan.

FINANCES

Available Funding Sources

We have a variety of funding sources available to the COA.

- I. **Operating Funds.** The one we talk about most often is our Operating Fund, which is funded through tax payer dollars. We cover these funds each month in our operating checkbook and our program & Activities checkbook.
 - a. **Balances.** Any unused funds at the end of the fiscal year is returned to the Town.
- II. **Revolving Funds.** Revolving funds are permitted by Massachusetts General Laws, Chapter 44, Section 53E ½ and the Town's bylaw establishing each fund, Article 55.1F, where the language reads " F. Council on Aging Social and Cultural Programs Fund. Funds held in the Council on Aging Social and Cultural Programs shall be expended for senior programs under the direction of the Council on Aging. Receipts credited to this fund shall include participant fees."
 - a. **Purpose.** We use our revolving funds to collect fees and to pay costs (Instructors, lunch vendors, credit card charges and supplies). Each year we are required to estimate the amount of funds we will receive and expend and once voted by Town Meeting, we are not permitted to exceed that amount.
 - b. **Balances.** Unused funds at the end of each fiscal year carry over into the next fiscal year. Funds do not leave the revolving fund unless expended for a revolving fund purpose.
 - c. **Project codes.** Currently, we have a general account and over 49 project codes for each program/activity that we have charged a fee for (Art, exercise classes, personal training, lunch, day trip). The fees charged go into the specific project code. At the end of each fiscal year, we work with finance and correct any negative balances and move any positive balances (caused by higher attendance in

classes) to the main account. Each year we pay our credit card fees, approximately \$2k a year, out of the general account.

- d. Pilot Programs. Pilot programs are paid out of the general account and allow for testing out new classes and providing an opportunity to build a following.

III. EOEA Funds.

- a. Purpose: The office of Executive Office of Elder Affairs provides funding to COA’s each year through entitlement grants. EOEA determines any and or restrictions on expenditures of the grant, they used to use a Green Guide. The guidelines for expenditures are now broad and we can use the funds on any senior related purpose.
- b. Use. We encumber a large portion of our annual grant to offset expenditures of the operating budget, leaving around \$20k to the discretion of the COA.
- c. Balances: Starting this year, any balance will be carried forward to be used in the next fiscal year, according to EOEA guidance.

IV. Gift Accounts.

- a. Purpose: Each gift fund has a specific purpose in which those funds can be used.
- b. Balances: The balance in any account for any given year will carry forward.

Name of account	Purpose	Requires:	Starting	Revenue	Expense	Balance
General Gift Account	All general donations are deposited here.	Board Approval	25,378	150	-	\$ 25,528
VDP Account	Donations from passengers specific to support VDP. Expenditures are intended to support VDP and historically have gone to provide recognition to VDP drivers.	Board Approval	1,283	-	-	\$ 1,283
FWCOA/Client Assistance	Established 11/14 with gift from FWCOA; Formal application required and requires approval of COA Director. Intended use is for individuals in need of financial assistance due to extenuating circumstances/financial hardship. Ideally 1 x only use	Director Discretion	5,063	-	130	\$ 4,933
COA Marketing Plan Account	Established 6/16 with grant from the Fund for Wellesley; funds specific to paying for COA Marketing and Brand Positioning Plan. 7/17 - Add'l \$10K gift for execution.	Board Approval	6,420	-	700	\$ 5,720
COA Gift Certificates Account	When someone wishes to purchase a COA gift certificate for another person, deposit funds here. Code the gift certificate to match the expense account.	Director	987	-	-	\$ 987
COA Bus Gift Account	New 10/15; donations specific to COA Bus.	Director	5,258	50	-	\$ 5,308
Authorized Taxi Transportation	Established 5/15 with gift from FWCOA; expenditures from this fund are to cover urgent medical transportation; approval of COA Director or Assistant Director required. Must be documented in MSC database in the client record.	Director/Assistant Director	767	-	-	\$ 767
COA Supplemental Programs	Established 12/13 with \$4K gift from Almira Simons Fund to supplement programs/services line item in operating budget.	Board Approval	1,653	-	-	\$ 1,653
COA Wlsy Hills Junior Women's Club	Established in 5/16 as the place to deposit WHJWC gifts specific to the E/W Lecture Series (previously was COA Supplemental Programs).	Director	2,062	1,500	-	\$ 3,562
COA Coffee Gift Account	Established 10/17 with gift from NEF for costs associated with coffee/dairy/café supplies. Donations are deposited as revenue.	Director	(403)	-	-	\$ (403)
COA Subscriptions/Magazine	Established 2/18 with gift from FWCOA for newspaper/magazine subscriptions for café.	Director	(405)	39	-	\$ (366)
Hot Meals Program	Established 10/20 with funds from Almira Simons to cover first few months. Funds transferred from BOH as remaining balance. \$10k grant 11/2020 from NWH Foundation.	Director	-	17,665	4,406	\$ 13,258

V. Funds available for fulfillment of COA requests.

- a. Purpose: Each fund has a specific purpose in which those funds can be used.

Name of account	Purpose	Expenditure Permission
Campana Funds	Programming for seniors and building modifications.	COA Board & SB
New Era Funds	Funding within the FWCOA, to support the mission and strategic plan of the COA and FWCOA to be used for unattended needs and opportunities at the COA beyond the capacity of the Town budget and other sources of outside funding. It will not support requests for ongoing personnel expenses. Requests of the NEF are to be filed by the first new day of each new quarter, of \$1k or more, generated by the Director after a vote of the COA Board.	NEF committee of FWCOA
FWCOA	Seeks to create vibrant aging experience to enrich lives of Wellesley citizens, 60 and older, by providing financial support for special programs, activities, and other needs of the COA.	FWCOA
Almira Simons Funds	Any Wellesley resident, male or female, age 60 or older who is encountering financial hardship.	FWCOA (Fred)

Capital Update

We are currently working with IT and Finance to procure many of our capital items under our printing capital for this fiscal year. At this time, we have ordered our new printer, scanners, IPADs, and two surface pro's. We waiting for them to arrive and be installed.

EOEA Contract

The EOEA contract was just released. We will work with Town Hall to get the contract processed, signed and returned and will come to the Board at the next meeting with requests/recommendations on potential expenditures.

FY21 Budget Update

There have been no major updates since last month, we continue to be on track and under budget. We will update this report and report back in February.

FY21 Gifts

We have received donations since our last meeting:

\$100.00	Sanjida Khudairi	No specified purpose- General Gift
\$100.00	Susan Cetlin	No specified purpose- General Gift

In addition to monetary gifts, we have received a few generous donations of:

Name	Item	Notes
Polly Conlon	American Flag	Flag was her grandfather's and she would love us to use it to replaced tattered one.
Jane and Tom Peterson	puzzles	Puzzles to add to our "Puzzology" Program
Eileen Kestenbaum	puzzle	Puzzle to add to our "Puzzology" Program

FY21 Program & Activities Budget

There have not been significant additions to the Program & Activities checkbook beyond the end of March. Once those additions are added, we will update for next month.

FY21 Sponsorship

Our updated list of sponsorships is below:

Sponsorship Tracking				
Sponsor Name	Program/Activity Sponsored	Date of Pro	Estimated/	Ration
Evans Park at Newton Corner	Barry Pell - Galapagos Travel Photo	7/23/2020	\$225	Actual
Bayada Home Health	Short Skirts - Anne Barret Lecture	9/24/2020	\$200	Actual
Bayada Home Health	Frank King Musical Lecture	10/28/2020	\$150	Actual
Evans Park at Newton Corner	Barry Pell - Antartica	11/13/2020	\$225	Actual
Evans Park at Newton Corner	Barry Pell - Morocco	12/17/2020	\$225	Actual
Dolphin Research Center	Dolphins Live & Interactive	1/14/2020		
Bayada Home Health	Frank King Musical Lecture	1/28/2021	\$150	Actual

OPERATIONS

Fitness Center

The Fitness Center has been operating and we have 30 weekly appointments scheduled and are able to accommodate 38 patrons at this time. Cleaning has been going well and all have been enjoying the Fitness Center.

In Person Attendance, one-on-one programs

As we are not sure what is next around the corner for us with regards to COVID, we will continue to plan to hold AARP Tax Prep appointments in person starting mid-February, but will stay tuned to any changes that may be our way.

If all goes well, we hope to transition IT help and possible IPAD access within the building come March/April.

PERSONNEL

Departmental Assistant Position

We have revisited this position and have interviews on the 20th for five candidates. Robin (HR), Greg, and myself will do the first round. If we enter a second round, we will invite the finalist(s) to interview on a round robin with each of our office staff members and a board member.

Training

The entire staff participated in a training on Alzheimer's with Tammy Poerycki on the 23rd of December. The staff enjoyed the presentation and were able to acquire new knowledge.

Greg completed MWRTA training in order to drive our COA bus, if needed. Greg has been enrolled in the Mass Municipal Personal Associations (MMPA) Senior Leadership Development Program (SLDP) for new municipal managers in March. Greg is also working on signing up for

ServSafe training and food safety to comply with the Board of Health requests for an on-site qualified manager.

PROGRAMMING

Newsletter

This past newsletter we ran into a snag with postage to the mailing company being delayed due to the mail and general mailing delays. We took steps to notify all patrons of our registration period and the newsletter being available at the center and online through email blasts and robo calls.

In order to avoid possible repeats, we have already taken care of the March/April postage so that there are no mailing delays on our part. We will watch mailing closely again this cycle and consider additional adjustments next cycle if results are not better.

SOCIAL WORK/OUTREACH

Financial Assistance

Kate has identified approximately five seniors who have requested new computers to connect with the internet and with Zoom. Current steps are in place to utilize Simons Funding to purchase “all in one” computers from local Wellesley business, the same vendor for Public Schools. These devices will be set-up with virus protection software and basic icons on the home screen to be “senior friendly” with low vision in mind. Kate will work with residents to help them set-up internet service and connect these devices to WiFi inside the home.

Themes

One common theme is an increasing number of residents who are reaching out to social services (for the first time) looking for affordable housing. Reasons for calls vary as some face unexpected income loss, medical challenges or begin to anticipate retirement. The challenge remains that Wellesley market rate rental options are not affordable and/or handicapped accessible. The wait list for older adults at subsidized housing in the Wellesley Housing Authority is ~ 5+ years; units are one bedroom or studios in poor condition or in disrepair. Overall, a general increase in anxiety as landlords raise rents or people are faced with life challenges in mobility and/or income loss.

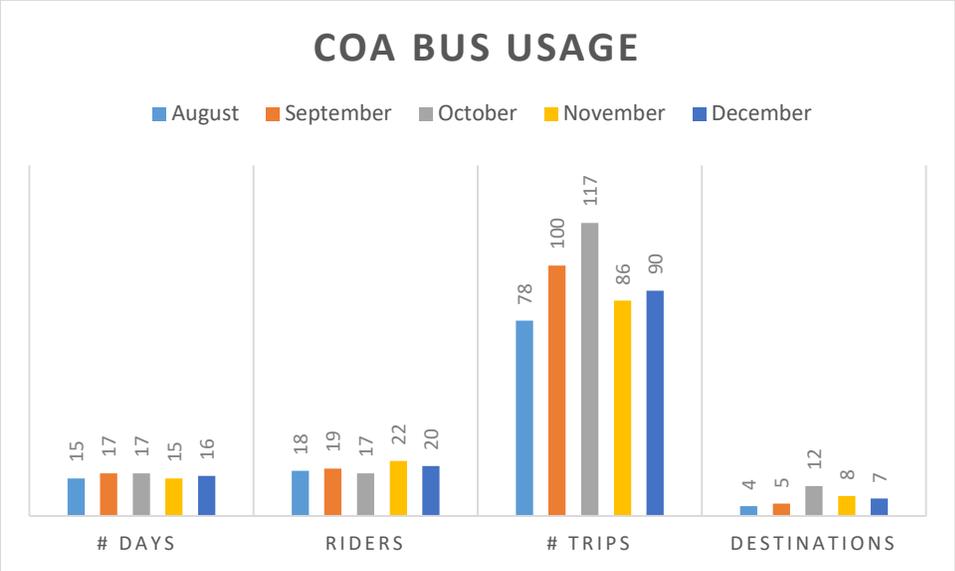
Healthy Aging Programming

The three-part series on Aging in Place program has 18 participants enrolled for the first session in February and we are planning dates for March and April.

TRANSPORTATION

Transportation Numbers

During the month of November, we provided service on 16 days, had 20 different passengers, provided 90 rides, and went to seven distinct destinations. Our numbers continue to vary as COVID is active.



<u>Destination</u>	<u>Address</u>
Roche Brothers	184 Linden St
NWH	2014 Washington St, Newton
Food Pantry	207 Washington St
Beth Israel Deacons Healthcare	372 Washington St
Whole Foods	442 Washington st
Dr Offices	65 Walnut St
	310 Chestnut St, Needham

UPDATES FROM THE LAST MEETING

Home Visit Policy

We are still working on this and hope to have it completed it by the January meeting.

EOEA Annual Report

We are still working on this and hope to have it completed it by the January meeting.

VOLUNTEER

Phone Pal

The Phone Pal Program is continuing on a very good course. Five new volunteers were trained in December bringing the total to 27 trained volunteers. We have currently made 25 successful phone pal matches. Of the five new volunteers, four were matched to new seniors in the program. The remaining two volunteers, including one from a previous training, will be matched as needs are identified.

Several of the volunteers, under their own fruition, have taken their relationships beyond the COA commitment of a weekly phone call and are developing meaningful adult friendships with

their matches. This is an organic process we expected to see to some degree, and it is nice to see this take off for these individuals. Volunteers report conversations lasting anywhere from a few minutes to over an hour.

IT Help

Our dedicated Tech Volunteer, Lois Clayson, had nine appointments in December for tech help. We did not have any recent zoom requests to connect with volunteers, but we continue to offer the option.

Reporting

Each month, volunteers submit their total hours spent volunteering for us, which includes, letting us know how things are going with their assignment(s). We are pleased to report all is going very well and in some instances, have exceeded expectations. For the past few months we had been using survey monkey and we will try to switch to an in-house option of Microsoft Forms moving forward to capture hours.

Volunteer Work

We have heard from several community volunteer groups looking for opportunities to connect with our seniors. We are collaborating with a 3rd Grade Wellesley Public School virtual class who will make Valentine cards to be delivered on 2/11 to our Hot Meal participants. We are exploring ways to engage a group of WHS students to send well wishes to seniors on our stationary on behalf of the COA. Our volunteer translator, Michelle Fang, has been a valuable resource helping us communicate the new occupancy restrictions on the bus to the riders of the Chinese community, as well as helping them register their rides with the MWTRA. Her efforts are greatly appreciated by staff, especially the bus driver!

Town of Wellesley COVID-19 Control Plan



Building: Tolles Parsons Center

Phase: 3 (Updated December 28, 2020)

Prior to any staff currently working remotely returning to the building, the Department Head must attest that the following guidelines have been reviewed with all staff members entering the building. The Department Head must also attest that all staff members have reviewed and understand information on COVID-19 Symptoms and Prevention Strategies on the Town's COVID-19 Information Hub at <https://coronavirus-wellesleyma.hub.arcgis.com/#Symptoms>

During Phase 3, access to Tolles Parsons Center will be by appointment only and only for specific programs. We will continue with opening our fitness center by appointment only to one household at a time.

Social Distancing

- Due to the requirements for Office Space at 25%, Tolles Parsons Center Administrative Office's will operate with two employees in closed door offices in the main office area, with the ability to have three employees on the second floor rooms, and one custodial staff member.
- All employees not in their closed door office will be required to wear masks at all times.
- Employees will be scheduled to work solo in closed rooms when on site.
- Employees shall keep their office/room doors closed at all time and may remove their masks while in their office alone.
- Available work spaces include: three (3) enclosed offices, an (1) enclosed conference room, and an (1) enclosed activities room.
- Employees will work to minimize all in person contact with other employees by remaining in their office. If they need something from another location, they will work to ensure that they are the only person in that area.
- Employees will limit all possible exposure time to patrons. Any in person interaction, such as brief orientation with the fitness center will be completed in less than 10 minutes and will a mask and gloves on.
- The elevator shall be limited to use by 1 household at a time.
- Gatherings must be limited to 8 people per 1,000ft space indoors, with a max of 25 people, unless otherwise authorized by a State Order. All Board meetings will continue to be held virtually. Occasional staff meetings will be held in person, spaced out in the multipurpose room and will contain no more than 10 people.
- Confined spaces (restrooms) must be used by only one person at a time. The 1st floor bathrooms are reserved for use by staff only and the 2nd floor bathroom will be open as appropriate for additional staff use. When the fitness center is in use, the bathroom inside the fitness will be available to patrons only. When other areas on the second floor

are in use, the bathrooms will be open to those patrons. When the Multipurpose Room is being use for any purpose, the handicap accessible bathroom will be available for use.

- All break areas and the kitchen will remain closed.

Hygiene Protocols

- Frequent handwashing is encouraged.
- Hand sanitizer wall mounts are provided in common areas and additional individual hand sanitizer is available in all office spaces.
- Staff should avoid use of shared office materials or equipment (telephones, copy machines, fax machines, water coolers, etc.) or disinfect between use.
- Visible signage is posted throughout the building to remind staff of hygiene and safety protocols.

Staffing & Operations

- Doors to the building will continue to be locked to those who do not have an appointment at the fitness center. Those working in the office will continue to have limited access to Tolles Parsons Center to specific work hours (8am-4pm) to allow for adequate cleaning in the afternoons.
- All patrons who entered the building will be screened upon entrance, logged that they entered and required to check out. They will enter through the door opposite Main Street. They will have restricted building access to the area(s) and for the purpose in which they are visiting. Separate protocols will be drafted for each type of program.
- All employees will enter the building through the front door and may exit by the front door or the side door. Employees will sign-in and sign-out with times and initials in the log in the front lobby.
- All employees will attest to the COVID-19 Checklist for the Town of Wellesley.
- All deliveries will be made at the side entrance (opposite Washington St). Delivery persons shall not enter the building unless absolutely necessary, and if so, any person entering the building will sign-in/sign-out on the building log-in the lobby and attest to the COVID-19 Checklist for the Town of Wellesley.
- Staff should continue to work remotely unless physical presence in the building is required to perform basic job functions.
 - If full-time remote work is not possible, staggered work schedules and/or shifts for staff should be used to minimize contact across workers.
 - Department Heads are responsible for work assignments and maintenance of the 35-hour staff work week.
- Face coverings are mandatory in common areas at all times, hallways, and whenever social distancing of 6 feet is not possible.
 - Acceptable face coverings include a mask, bandana, scarf, or other cloth material to cover your face and nose. Use of homemade face coverings is encouraged.

Additional information on face coverings, including instructions for how to make your own cloth mask is available from the CDC at <https://www.cdc.gov/coronavirus/2019-ncov/prevent-getting-sick/diy-cloth-face-coverings.html>.

- Masks are not required when working in an isolated office with a closed door.
- A limited supply of disposable 3-ply masks will be made available to all staff.
- If you have a medical condition that precludes you from wearing a face covering, please discuss this matter with your department head or Human Resources.
- Workers shall stay home if feeling ill and are strongly encouraged to self-identify symptoms or close contact to a known or suspected COVID-19 case to their Department Head.
- Workers who are particularly vulnerable to COVID-19 according to the CDC (e.g. age or underlying conditions) are encouraged to stay home or arrange an alternate work assignment.
- Should an employee become sick or exposed to COVID-19. The attached CDC guidelines must be followed prior to the return to work. The Health Department in your community and the Wellesley Health Department must be notified immediately. Staff will be notified as soon as possible if this guidance changes.
 - <https://www.mma.org/wp-content/uploads/2020/05/DPH-Updated-Non-Healthcare-Workers-Return-to-Work-Guidance-May-7.pdf>
- Massachusetts's Travel Order is in effect. If a Worker will be traveling out-of-state please consult with the most up-to-date travel order as you may be required to quarantine 14 days or provide a negative test result before returning to work. Please check the CDC and State guidelines for the most up-to-date requirements, as they have periodically changed.

Cleaning & Disinfecting

- Facilities Management Department staff will continue daily cleaning and sanitation of all high-touch areas. Sanitizing spray or disinfecting wipes will be provided for staff to clean their own workspaces.
- In the event of a positive case, the building will be closed immediately for a deep cleaning and disinfecting of the workplace in accordance with CDC guidance.
- Staff are encouraged to retain a "clean desk" at the end of each day and put paper away. Should an emergency cleaning be required, this will decrease the risk of any materials being impacted or damaged.