

**CONCEPT PAPER FOR**  
*AustinUP*  
**PLANNING FOR AGE DIVERSITY**

Over the next decade, the demographics of Austin are projected to shift.

In response to Austin's increasing age diversity, Mayor Lee Leffingwell convened a Task Force on Aging in 2012-13. He charged the group with developing strategic recommendations to ensure our aging neighbors have the resources to be healthy, independent and integrated into community life.

The Task Force recommended creating 2 new vehicles to ensure our community successfully serves and benefits from the aging of our population over time:

1. A City of Austin Commission on Seniors (recently created)
2. An independent nonprofit to convene, advocate, and coordinate across sectors

The following is a Concept Paper to describe the role of a new nonprofit organization.

**Austin MSA Experiencing Rapid Demographic Shift**

- Austin Metro nation's #1 fastest growing population of people between ages 55 and 64
- 2nd fastest for people 65 and older
- 80% increase in residents over 55 between 2000-2010 (compared to 37% growth overall population)

**Seniors Are Substantial Untapped Market**

- "Boomers" (age 50-68) hold 70% of U.S. disposable income
- Spend 50% of all consumer goods
- Yet less than 5% of advertising is geared toward them

## ***AustinUP***

### Mission

*AustinUP* convenes, advocates, and coordinates across sectors to address the needs and maximize the benefits of our aging population. The initiative asks each sector of the community to participate in making Central Texas a place where citizens of all ages can live full, engaged lives.

### Purpose

Central Texas' shift to a fast growing aging demographic is new. While there are several high functioning organizations serving older residents, the Austin Metro area does not have an entity to coordinate across sectors (public, service, business, citizenry) to engage in developing regional resources to ensure our aging neighbors can be healthy, independent, and integrated into community life.

Additionally, most Central Texans are unaware of the changing demographics, and the actions we must take to address them so that our region's growth remains healthy.

- Businesses may not prioritize age-friendly products or services, because they are unaware of the opportunities.
- Citizens and public entities may not prioritize infrastructure improvements or affordable housing, because the reality of citizen needs is not understood.
- Caretakers and seniors may suffer in isolation because they do not know about resources available to them.

**Seniors in Austin MSA are a substantial untapped market.** "Boomers" (age 50-68) hold 70% of U.S. disposable income and spend 50% of all consumer goods sales. Yet, less than 5% of advertising is geared toward them (*Nielson Report 8/6/2012*). Additionally, Boomer spending has increased twice as fast as spending by people 35 and under (*The New York Academy of Medicine*).

The phenomenon of an aging demographic is taking place across the country and the world. Cities such as New York, Washington D.C., Portland, and Philadelphia are actively working across sectors to become more age-friendly.

*AustinUP* will advocate, engage, and coordinate across sectors so citizens of all ages in Central Texas can live full, engaged lives.

## General Description

*Austin UP* will serve as a membership organization, including individuals, businesses and service providers, that focuses on:

- Advocacy and Public Awareness
  - Present policy positions and interests to City, County, Capital Metro, Central Health and other public or quasi-public entities
  - Develop public awareness campaigns to inform the public about the needs and benefits of older citizens. Also, develop campaigns to provide needed information to the public
  
- Engagement and Membership
  - Conduct surveys, town hall meetings and other events to engage the public and solicit input
  - Develop meaningful membership services, especially for businesses that can serve and benefit from seniors (age-friendly assessment)
  
- Planning and Coordination
  - Manage partnerships between different service entities to improve services
  - Leverage expertise and seek opportunities for intergenerational programs
  - Develop a centralized repository for information
  - Provide consulting and facilitation
  - Develop resources by applying for federal and national funds
  
- Innovation
  - Collect data to share with members
  - Conduct research
  - Engage in a national/global conversation

*AustinUP* will conduct and collate research on the aging in Central Texas, share and publicize the data, and use the data to influence change. The organization will ensure our communities long-term commitment to addressing the issue of aging in Central Texas.

## Business Model

*AustinUP* will be set up as a nonprofit organization with a goal of generating enough earned revenue to cover over half of its operating costs. The following include the planned revenue sources for the organization.

- Memberships

The organization will solicit memberships from businesses, foundations, service providers and individuals in return for a variety of member services. *AustinUp* will engage in surveying to identify the primary needs and concerns, sources used for information, buying preferences, policy priorities, entertainment choices, and other trends. Members will be provided with survey results. Additionally, the organization will plan town hall meetings and round table discussions to discuss issues and garner a deep understanding of members needs.

- Consulting Services

*AustinUP* will work with businesses to help them best tap into the older adult market. The organization will assist with advertising age-friendly businesses. Entrepreneurs will be matched with service providers to provide insights on the experiences and desires of older adults.

- Age-Friendly Business Assessments

*AustinUP* will develop an assessment tool that can be used to help businesses be more successful and meeting the needs of their older adult patrons. The tool will include a check list to assist stores in making physical modifications, and to assess whether their products or services are providing value for older adult clientele. Businesses that meet basic standards can join a list of “approved businesses” who are in touch with older adult interests.

- Speaker Series and Other Events

*AustinUP* will host a series of events to generate discussion and new ideas around seniors and age diverse communities. These events will seek sponsors and generate revenue from ticket sales.

- Grants

The increasing older adult demographic is becoming a priority nationally and around the globe. Foundations are showing a growing interest in strategies to better meet the needs of an older population and create more age-friendly communities. Additionally, businesses are going to become savvy about serving this market. New public and private resources are likely to become available for initiatives that can pool local resources and work across sectors.

## Market Interest

A sampling of business owners who provide services to seniors has shown enthusiastic support for the *AustinUP* concept. Through initial one-on-one and group meetings, business owners have expressed enthusiasm for the idea of a centralized entity that would:

1. Provide a vehicle for them to engage in issues affecting seniors, and
2. Build an Austin culture that embraces the increasing age diversity of our region

Business owners who participated in meetings at the Mayor's Office articulated a resounding interest in becoming dues paying members of *AustinUP*. Additionally, several participants were interested in serving on a committee of Founding Members to develop a public awareness campaign and to get out the word to other businesses.

Meetings with members of the business community are continuing with a meeting of bigger businesses being planned for June.

## Governance

### Board

- *AustinUP* would include a diverse, executive-level Board that represents a cross-section of community leadership from the business and service community

### Working Groups

- Working Groups would be formed to allow a broad group of interested stakeholders/members to participate in the organization's activities. The groups would be aligned with the functional areas described in the General Description.

## Staffing

Initial staffing includes an single Executive Director who is tasked with building membership, forming stakeholder working groups and coordinating the first activities, such as the Public Awareness Campaign. As the organization and revenue sources grow, *AustinUP* would add a Membership Director to lead stakeholder engagement, and an Administrative Assistant.

## Start Up Budget and Pro-Forma

See attached Financial Model

The Financial Model includes 3 spreadsheets:

### 1. Start-Up Budget

High: \$168,000

High scenario includes 1 year of Executive Director staffing and 6 months of operating funds.

Low: \$61,000

Low scenario includes 6 months of Executive Director salary and 3 months of operating funds. In the low scenario it would be assumed that the Executive Director would be in a position to quickly garner additional revenue.

### 2. Pro-Forma

The Pro-Forma includes probable, strong and weak scenarios. The Pro-Forma is a “working model” and can be used to plug in a variety of assumptions. Formulas are embedded so it is ideal to work exclusively in the BOXED area.

### 3. Revenue Assumptions

The revenue assumptions provide a mechanism to project revenue from the different sources described in the Concept Paper. The Pro-Forma spreadsheet reads the revenue off the Revenue Assumptions spreadsheet.

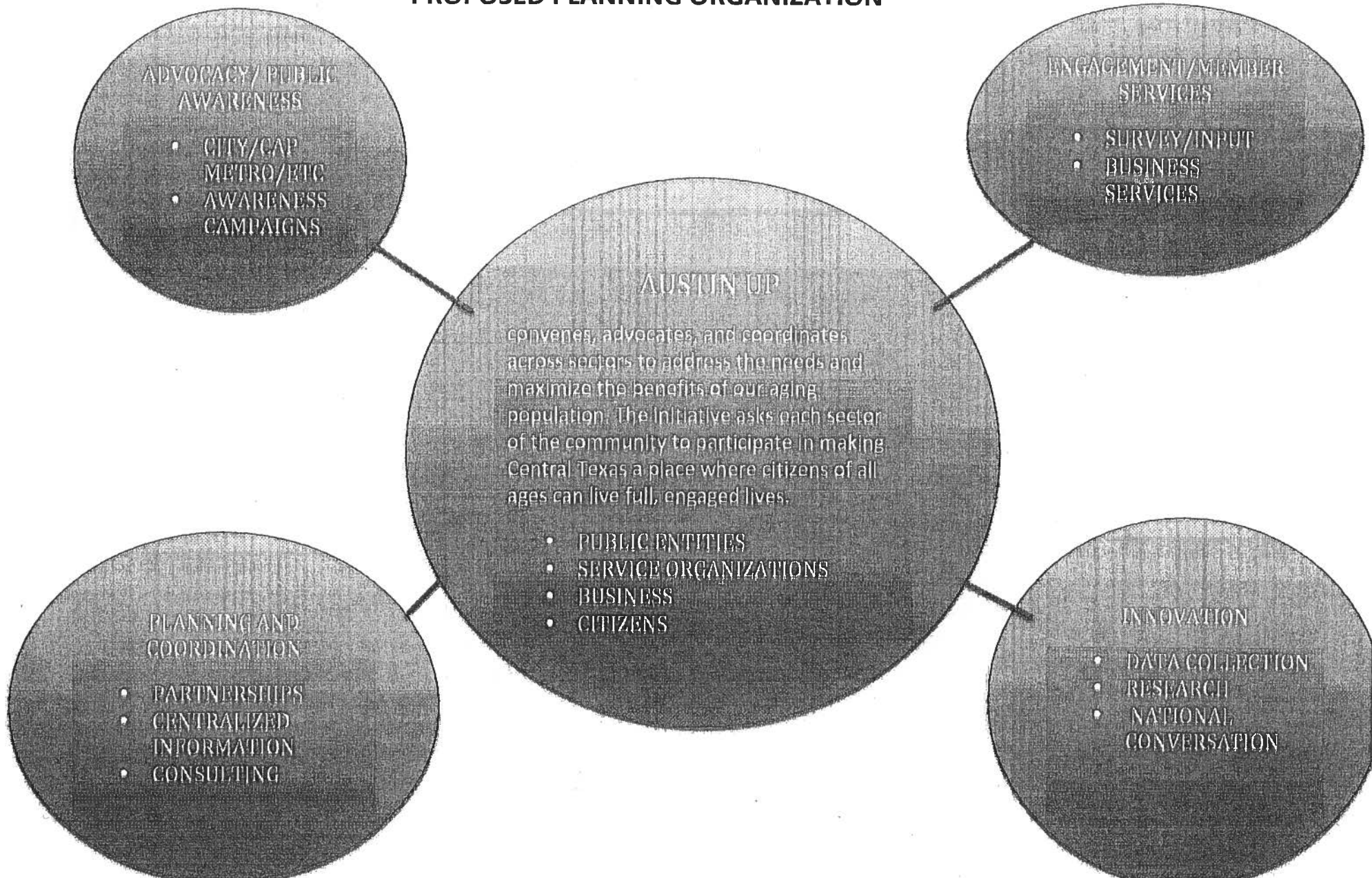
## Funding Sources

Working across sectors and with a variety of service providers creates new opportunity to attract national funding sources. National Foundations and Federal Programs may be more interested in cooperative efforts than the efforts of a single non-profit organization.

*AustinUP* has the ability to tap into National Foundations who are becoming increasingly interested in supporting efforts to create age-friendly and age-diverse communities.

A few of the national foundations interested in this work include: H.J. Weinberg Foundation, Kendal Charitable Funds, Met Life Foundation, and Pfizer.

## PROPOSED PLANNING ORGANIZATION



# AustinUP Launch – Annual Membership 2015

## 2 Week Public Awareness Campaign/Austin Under 80 Awards

<b>Large Business Memberships</b> (revenues over \$20 million)	<b>\$2,500</b>
❖ Logo recognition on website	
❖ Recognition on materials at Austin Under 80 Awards	
❖ 5 tickets to Austin Under 80 Awards	
<b>Mid-Size Business Memberships</b> (revenues between \$5-\$20 million)	<b>\$1,000</b>
❖ Recognition on website	
❖ Recognition on materials at Austin Under 80 Awards	
❖ 2 tickets to Austin Under 80 Awards	
<b>Small Business Memberships</b> (revenues over \$1 million)	<b>\$500</b>
(revenues under \$1 million)	<b>\$250</b>
❖ Recognition on website	
❖ Recognition on materials at Austin Under 80 Awards	
❖ 2 tickets to Austin Under 80 Awards	
<b>Foundation Memberships</b>	<b>\$2,500</b>
❖ Logo recognition on website	
❖ Recognition on materials at Austin Under 80 Awards	
❖ 5 tickets to Austin Under 80 Awards	
<b>Nonprofit Memberships</b> (budgets over \$1.5 million)	<b>\$500</b>
(budgets under \$1.5 million)	<b>\$250</b>
❖ Recognition on website	
❖ Recognition on materials at Austin Under 80 Awards	
❖ 2 tickets to Austin Under 80 Awards	
<b>Individual Memberships</b>	<b>\$80</b>
❖ Updates on all events throughout the year	
❖ Priority notice for all events during Public Awareness Campaign	
❖ 50% discount on 2 tickets to Austin Under 80 Awards	

Please make Checks Payable to: *The Mayor's Better Austin Foundation*

And sent to:

The Mayor's Better Austin Foundation  
Care of: James Cousar  
98 San Jacinto, Ste. 1900  
Austin, TX 78701

The *Mayor's Better Austin Foundation* is our fiscal sponsor and certified 501(c)3 nonprofit.



## AustinUP Business Steering Committee

<b>MEMBERS</b>	<b>AFFILIATION</b>
Angela Atwood, Chair	Meals On Wheels And More
Travis Froelich (retired)	Seton
MariBen Ramsey	Austin Community Foundation
Michael Wilson	St. David's Foundation
Arnold Garcia (retired)	Austin American-Statesman
John Brown	Walgreens
Cyndee Cummings	Keller-Williams / Junior League
Julie Latson, MHA	Querencia at Barton Creek
Juliette Surratt, LVN	Hearthstone, Park Valley Inn
Tuck Kamin	Principal of Potential Being
Antoinette Griffen	Austin Seniors Guide
Edwin Young	Right at Home
Diana Mclver	Mclver and Associates
Chris Grant	Sliver Link
Sally Van Sickle	Applied Materials
Kathy Marshall	BlackBaud