



Levine Senior Center and Charlotte-Mecklenburg Senior Centers
2012 Merger/Functional Consolidation Feasibility Study
Final Report
November 2012

Background

Over the last decade or so, the senior population in Mecklenburg County has grown significantly with more than 170,913+ seniors living in the County¹. This is an increase of over 70,000 senior adults in only ten years. In this time, the Charlotte-Mecklenburg area has become a community that provides an excellent quality of life for residents of all ages. Part of being a desirable and sustainable community is having services in place to support senior citizens and retirees.

Mecklenburg County is fortunate to have several agencies dedicated to enhancing the quality of life for senior residents of this region. Two of these agencies are the **Charlotte-Mecklenburg Senior Centers** – a long-standing agency in the community and the **Levine Senior Center** – a newer agency that received seed money from the Levine Foundation.

While Mecklenburg County has funded senior-oriented programs for years, at a Special Budget Workshop Session held May 30, 2012, a request was made for the County Manager to explore the feasibility of the Levine Senior Center (LSC) and Charlotte-Mecklenburg Senior Centers (CMSC) consolidating into one agency. At the time, the County Manager mentioned that the LSC funding was contingent upon undergoing a feasibility study. Utilizing information from both agencies, the goal was to determine if there were areas to consolidate or efficiencies to be gained in service delivery.

Process

In July 2012, the County Manager's Office created a working group and a steering committee to serve as the agents of the project. An initial meeting was held between staff in the Office of Management and Budget (OMB) and the executive directors of the LSC and of CMSC. A project plan [**See Appendix A: Project Plan**] was developed and shared with members of the steering committee. The project plan included the governance structure, a focus on finding ways to save money, creating synergy, improving business processes and increasing appeal to outside funders. Each of the areas is in the order of priority. Additionally, the plan included governance, outcomes, process steps and timeline. Over the last month, the OMB staff received information on the agencies and analyzed the relevant data.

Overview

The purpose of this report is to inform the reader with information that is divided into five key sections: agency overview, key findings, opportunities for cost savings, other considerations (costs-unidentified) and conclusion. Several attachments accompany the report. Additional information may be made available upon request.

¹ U.S. Census Bureau 2010 Statistics



Section 1: Agency Overview

Two agencies were reviewed in this study. They are the Levine Senior Center (LSC) and the Charlotte-Mecklenburg Senior Centers (CMSC).

The mission of the Charlotte Mecklenburg Senior Centers, Inc. is to serve as a focal point to deliver a broad spectrum of services and activities to older adults throughout the Charlotte Mecklenburg community. This organization strives to help seniors with their health and wellness, decrease their loneliness and isolation, and provide assistance with social, economic, and educational opportunities to enhance the quality of their lives.

The mission of the Levine Senior Center is to thrive on empowering seniors to celebrate living by developing new relationships through fellowship, enhancing their power of knowledge through stimulating activities and believing in the concepts of boundless aging.

Each agency services a large number of senior partners throughout Mecklenburg County and in surrounding jurisdictions. The matrices below highlight the number of customers served over the past three years and an overview of customer locations throughout Mecklenburg County.

Population

	Levine Senior Center	Charlotte-Mecklenburg Senior Centers
2010	<ul style="list-style-type: none"> • 834 partners* • 1,167 non-partners 	<ul style="list-style-type: none"> • 2,136 seniors served** • 1,742 senior center participants • 646 Annual Discount Card holders • 394 RSVP volunteers and Senior Employment participants that choose NOT to utilize services of centers
2011	<ul style="list-style-type: none"> • 847 partners • 1,276 non-partners • 121 SilverSneakers® 	<ul style="list-style-type: none"> • 2,750 seniors served** • 2,360 senior center participants • 526 Annual Discount Card holders • 383 RSVP volunteers and Senior Employment participants that choose NOT to utilize services of centers
2012	<ul style="list-style-type: none"> • 806 partners • 1,354 non-partners • 234 SilverSneakers® 	<ul style="list-style-type: none"> • 4,023 seniors served • 3,617 senior center participants • 646 Annual Discount Card holders • 412 RSVP volunteers and Senior Employment participants that choose NOT to utilize services of centers

* SilverSneakers® not offered at the center

** Number is understated because North Meck, West Side were not fully included in the database yet



Location of Clients Served

	Levine Senior Center	Charlotte-Mecklenburg Senior Centers
Mecklenburg County	76%	96%
Union County	24%	-
Other	0%	4%

Section 2: Key Findings

The following information is broken down by the four perspectives on the Mecklenburg County Balanced Scorecard. The perspectives are: Customer/Stakeholder, Financial, Internal Business Process, and Employee & Organizational Capacity.

Customer/Stakeholder Perspective

- While both agencies have a mission and a vision, CMSC is focused more on stability and long-term growth, whereas, the LSC is more focused on long term growth and awareness of programming.
- One commonality with the agencies is a great need to address facility concerns.
- The agencies have a variety of senior friendly programs offered that range from Tai-Chi to Bridge to free tax services. However, there are some programs and services that are only offered by one agency and not the other such as, water classes, Zumba, Cardio Circuit, ballroom dancing, cheerleader class and hula performers at the LSC. The LSC offers specialized programs including the Healthways SilverSneakers Fitness Program and TOPS. In addition, CMSC offers specialized programs including the Retired Senior Volunteer Program and Senior Refugee Services and classes such as table tennis, walking groups, jazzercise, and cooking classes **[See Appendix C: Specialized Programs and Services.]**
- Despite the ability to provide a large number of services, both agencies have reduced programs and are unable to provide programs and services that (1) did not generate sufficient revenue, (2) did not meet the required number of minimum participants, and/or (3) are unable to meet the demand and have had to use a wait list.
- The CMSC and the LSC have varying hours of operation. While the LSC is able to have longer hours for partners of the LSC and activities that continue until 7:00 p.m., the CMSC Tyvola, Shamrock & North Meck Centers close by 5 p.m., and West Side Services close at 1 p.m. due to budget cuts. In addition, neither site offers weekend hours of operation. However, the Levine Senior Center offers several weekend events quarterly. Increased funding of both agencies could allow more operating hours and increased programming for seniors, especially for seniors still working
- CMSC, as Mecklenburg County Senior Health Insurance Information Program Coordinator, provides the volunteer Medicare counselors assigned to eight locations including LSC.



Financial Perspective

Levine Senior Center (LSC):

- The value of the LSC building and land is \$5.3M.
- The balance of the LSC mortgage is roughly \$800,000 amortized over twenty years. The LSC makes monthly mortgage payments in the amount of \$5,197. As the final year in a three year business plan with the Leon Levine Foundation, the LSC will receive \$50,000 in 2013 if they meet their 2012 operating goal. In 2011 the Leon Levine Foundation matched a challenge grant for \$62,000. There is no funding plan in place beyond December 2012 with the Leon Levine Foundation.
- Despite the Levine name of the LSC, the LSC is not completely supported by the Levine Foundation.
- The LSC will lose roughly \$42,000 in revenue in the next year due to an ending weekend rental agreement with a local church. This revenue will be difficult to replace.
- The Levine Center had a decrease in Net Assets in FY11 of \$149,551, or they spent this much more than they collected in revenue.
- The Levine Center will need to find alternative and sustainable revenue sources in order to stabilize their financial wellbeing.

Charlotte-Mecklenburg Senior Centers (CMSC):

- The CMSC are a significantly more expansive operation who serves a greater cross section of the community's senior population (several sites located around the County, central, north, south, south west and west.
- The CMSC do not have any facility debt service obligations, the Tyvola facility is paid for, and the others are rented at nominal and very reasonable fees.
- Tyvola Center is facing severe facility replacement needs (Roof, HVAC, wall paper, painting, and water damage from roof leaks) at an approximate cost of \$500,000.
- Maintenance costs for aging facility and HVAC are becoming difficult to manage within current budget. The agency would like to be able to do roof/HVAC renovations at one time to minimize costs, seeking external funding to bring facilities to expected standard.
- The CMSC partner with County services, (co-locating with Park & Rec, providing senior nutrition site for DSS). The agency only pays rent in Huntersville site - \$30,000 annually.
- The CMSC operating budget (Minus rent costs) is roughly - \$1,530,078.
- The CMSC began funding a capital replacement fund roughly five years ago in the amount of approximately \$50,000 per year. Currently they have roughly \$190,000 in the fund.
- The CMSC full-time employees are offered participation in a medical insurance plan, though very expensive, seven of the ten employees eligible for health insurance utilize this benefit at an average monthly cost of \$531 to the agency and \$ 531 to the employees. Additionally, four of the seven cover their spouse and/or children; three cover themselves only.
- The CMSC show a net surplus of \$11,460 in FY2011 for a difference in Total Revenue and Total Expenses.
- CMSC has/is receiving funding from the United Way and Mecklenburg County Community Service Grant.



Internal Business Process Perspective

- Both the LSC and CMSC utilize anywhere from 70 - 80 volunteers (weekly) to sustain their operations and provide the much needed programs and services. Without the support of volunteers, the agencies would not be able to sustain operations; therefore, making each agency vulnerable.
- At the LSC there are only three full-time staff and two part-time staff. At the CMSC there are only 10 full-time staff and five part-time positions to operate four service locations, the Retired Senior Volunteer Program and the Senior Employment Program.
- Upon entering the agencies, partners/participants must scan their access cards. Once the cards are scanned, the information is captured in a database linked to the partners' account information. The process allows for the agencies to keep track of who enters every day as well as what services and programs are generating revenue based on the visits.
- The CMSC has several equipment leases that are associated with computers and other equipment needed at their four locations. The LSC has one lease agreement with Marlin Leasing-3 copies/printers.
- Both agencies have been fiscally responsible and took significant reductions in costs over the last three years mainly to account for the effects of the recession on business.

Employee & Organizational Capacity Perspective

- With more than 150 years of non-profit/management experience for LSC staff and more 200 years of non-profit/management experience for CMSCs' staff, the staff at both agencies is more than qualified to provide the services that meet the needs of seniors.
- At both agencies there is no underutilized space; therefore, for the agencies to be co-located, the agencies would need to move to another identified space. Doing so could be a significant cost.
- While the agencies have sufficient technology to support their operations, much of the technology is in need of upgrade or replacement, although the need is seemingly not pertinent to the survival of each agency.

Levine Senior Center (LSC):

- Out of all the concerns the agencies have expressed in this study, the concerns that create the most precedence are on major capital improvements such as at Levine there is a need to enlarge and expand the fitness facility and swimming pool area to meet the demands for the service.
- Another significant need is to replace the kitchen equipment at Levine. One of the largest sources of revenue for the agency is facility rental for large events. In the event the agency is not able to offer prepared food, then there could be significant risk to Levine's ability to rent the facility. However, occasionally the LSC is rented with and without in house catering services.
- More minor needs entail expanding the storage space at Levine.

Charlotte-Mecklenburg Senior Centers (CMSC):

- Major facility improvements are necessary at the Tyvola location of the CMSC, which is owned by the agency. Therefore, the CMSC is responsible for capital improvements. The types of investment are significant, such as roof replacement, drainage and HVAC needs.
- The roof is not structurally sound, has been repaired many times over its nineteen year life and currently has several leaks. Drainage runoff is an also an issue at this site and has caused the agency to primarily focus on structural roof repairs.
- Other needs at the Tyvola facility include a need to replace the thirteen HV/AC units that are all 19-years old.



- Tyvola, Shamrock and North Meck Centers need more program space in order to meet the needs of current and potential participants. There are waiting lists for some services/classes

In addition to the key findings listed above, the Office of Management and Budget conducted a SWOT Analysis on each agency. **[See Appendix B: SWOT Analysis for Levine Senior Center and Charlotte-Mecklenburg Senior Centers]**

Section 3: Opportunities for Cost Savings

Based on the information reviewed, staff believe if a consolidation were to take place that the following items would be considered that could result in substantial front-end costs for both agencies (est. range \$100,000-200,000 depending on scope and size of merger): legal structure, consultants, design & printing, severance, moving, systems integration and other associated costs (i.e., new space, new programs). As a result of the financial challenges facing both agencies and potential consolidation costs incurred, a consolidation may not be feasible at the time of the study. Staff however identified some opportunities for cost savings that may not be supported entirely by the respective agencies Board of Directors.

Staff

Both centers are operated by very limited staff and depend greatly on volunteers to maintain operations. The LSC operates with a paid staff of has a total staff count of three full-time staff and two part-time staff with a total reported cost of \$210,735. The CMSC operates four service locations and two non-facility based services (i.e., Retired Senior Volunteer Program and Senior Employment Program) with a paid staff of 15 employees, 10 FT and 5 PT with a total reported cost of \$594,571. There is limited opportunity to consolidate or reduce total staff count in either operation, as doing so may limit the agencies from meeting the customer demands. Additionally, the CMSC has reduced staff independently due to economic conditions over the past two years; whereas, the LSC has had no staff reductions. Both organizations rely on business management staff who are current retirees who handle multiple functions such as HR, IT, communications, etc., which limits the opportunity to consolidate business services functions and shift additional responsibility on one or the other. If a consolidation were to take place, the eligible savings would be the salary of one director (roughly \$50,000) and possibly the salary of one part time bookkeeper (\$18,000) although the savings overall may be minimal because losing one director may not be beneficial to the receiving agency in the long-run.

Benefits

One current difference between staff costs is that the CMSC offer their employees medical coverage, while the LSC does not. The cost to the CMSC for employee health insurance (which includes medical, vision, & dental (for seven employees), long-term disability, life insurance (for ten employees) in 2012-2013 is \$52,840. Although identified as a potential cost savings for the CMSC, the value in having such benefit is greater than not. By being able to provide health benefits to employees, doing so may help with recruitment and retention of staff, as well as provide a psychological wellness benefit to employees.



Service Contracts/Lease Agreements

Both agencies have submitted a list of contracts and leases and from a review of this list; it appears that there may be limited opportunity to find savings by bundling contracts with joint providers. The total amount of service contracts and leases between both agencies is \$81,561 (Contract -\$59,901/Leases Lease - \$21,660 for CMSC) and \$26,513 for the Levine Center. This opportunity is reduced because of the modest size of each contract as well as the physical distance between locations.

With regards to specific components of the contracts, there may be some savings although minimal as the dollar amount for contracts ranges from \$6,500 to \$10,300. However, there may be opportunity to re-negotiate contract amounts with vendors to create economies of scale.

	<u>CMSC</u>	<u>Levine</u>
Trash Removal	5,592 (2 locations)	3,625
HVAC Maintenance & Repair	2,700 (1 location)	1,712
Pest Control	1,428 (2 locations)	1,116
Repair of Fitness Equipment	600 (1 location)	400
Total	10,320	6,853

Building, Land & Maintenance Costs

The LSC owns their facility, valued at \$5.3 M, with an outstanding mortgage of \$823,000 equating to a monthly payment amount of \$5,200. The CMSC owns their Tyvola facility and rents one other for \$2,500 per month and pays no rent for two other sites. The CMSC operates in an aging facility and is faced with nearly \$500,000 in much needed repair costs in order to maintain safety standards. The LSC operates out of a much newer facility and faces minor facility costs. These costs would not change in the event of an organizational consolidation and it is not feasible to sell either property given the current market value of each property.



Section 4: Other Considerations (Costs-Unidentified)

Cross-Promotion of Programs and Services to Customers

There is opportunity for the agencies to cross-promote programs and services between agencies especially for those programs that may be specialized or programs in which there is under enrollment. One such opportunity for partnership may be with the Levine Senior Centers SilverSneakers® program. A recommendation then is to engage in joint marketing by creating a Master calendar of specialized programs.

Additionally, through a Memorandum of Agreement, the agencies could partner in fundraising efforts in the community and build a stronger partnership between the agencies, given that the LSC serves an area of the county that the CMSC is unable to serve in the current footprint. Another method could be to use e-blast or work with other partnering agencies such as: Area Agency on Aging Association - Centralina Council of Governments, and the Alzheimer's Association for example. These partners can promote the programs on behalf of each agency. Doing so will increase the appeal each agency has in the community.

Leveraging Resources

The agencies can pursue opportunities to jointly apply for grant dollars. As the mission of each agency is to meet the needs of seniors in their geographic area, if regional elderly care grants or technology grants are available, both agencies can draft grant proposals and apply for grants that will support each other's initiatives.

Awareness of Agency to the Community

While the Levine Senior Center is often perceived to be fully funded through the Levine Foundation because of their name, this is simply not true. Likewise, Charlotte Mecklenburg Senior Centers are perceived to be fully funded by Mecklenburg County government. Therefore, by educating the community using free media sources or other mediums, the agencies can create awareness thereby attracting special interests groups, raising funds, or increasing revenue for certain programs and services that have low attendance or are in higher demand.



Section 5: Conclusion

The Levine Senior Center and Charlotte-Mecklenburg Senior Centers are two well-respected agencies in the Mecklenburg community. Both agencies effectively serve their clients and ensure that the seniors' quality of life needs are met as well as identify opportunities for meeting the needs of the socially isolated seniors. While there is some overlap in the types of programs and services each agency provides, there is no duplication of services to the partners. Due to the demands for certain programs and poor transportation of seniors to the agencies, there is little to no opportunity for the agencies to consolidate entirely or partly.

Several challenges have been identified as reasons:

1. The majority of seniors for both agencies live near the centers they most frequent. Therefore, by closing down a facility, there may be fewer seniors served in the Charlotte-Mecklenburg area than more seniors served.
2. Given the increasing population in the Charlotte-Mecklenburg area, the demands for services continue to grow thereby making a full-consolidation difficult, as there is more need to expand programs instead of collapsing and consolidating core functions.
3. In the event of a merger, there are minimal savings identified in the back-office or overhead functions such as Human Resources, Information Technology, or other support services.
4. Selling any of the buildings for the agencies would not be feasible given the current market value of the properties.

Therefore, given how "lean" the agencies are, the recommendation given in this report is for both agencies to remain in their respective locations, retain their legal status in naming and in tax structure, but to strongly consider ways to more efficiently collaborate with one another. The two agencies should cross-promote programs and services, leverage resources, partner to increase awareness of the agencies to the community, and re-negotiate contracts possibly creating economies of scale.

At the time of this report, Executive Directors at the Levine Senior Center and Charlotte-Mecklenburg Senior Centers have agreed to continue exploring ways to partner and identify cross-collaboration opportunities. Additionally, the Executive Directors and Board Members are amenable to developing a Memorandum of Agreement that will be used to help facilitate dialogue amongst one another as well as can be used to communicate to the larger community they are committed to working together.

Given the large number of senior-friendly agencies serving the Charlotte-Mecklenburg community, staff believes there is a need to expand the focus of addressing senior matters in the community. Two agencies known to currently address senior matters from a strategic standpoint are the Aging & Disability Resource Center and the United Way Central Carolinas. Additionally, the Charlotte Resource Connections is the largest referral agency (supported by Just One Call), and the Centralina Area Agency on Aging is the largest planning agency around senior matters in the nine counties served. There may be opportunity to expand collaboration beyond the CMSC and LSC to include these other senior-friendly agencies serving the Charlotte-Mecklenburg community.



Appendix A: Project Plan

Scope of Project

The purpose of the study is three-fold: a) to assess the strengths and weaknesses of each agency relative to achieving its vision and mission; b) to assess the benefit of merging the agencies or consolidating functions from the following perspectives: customer, financial, business operations and organizational capacity, and c) to solicit feedback from the respective Boards and Steering Committee members regarding a potential merger or functional consolidation.

Governance

The evaluation team comprises of two ad hoc groups. The *Working Group* will conduct the assessment, provide periodic updates to the *Steering Committee* as work is completed, and produce a final report. The *Steering Committee* will review information provided, determine if any follow-up is necessary, facilitate Board engagement and resolve to proceed or not proceed with a merger or functional consolidation.

Steering Committee

Working Group

Harry L. Jones, Sr.	County Manager	Monica Allen	Mecklenburg County
Leslie Johnson	Mecklenburg County	Tiffany Waddell	Mecklenburg County
Hyong Yi	Mecklenburg County	Blake Hart	Mecklenburg County
Tina Ross**	Levine Senior Center	Trena Palmer*	Senior Centers
Ann Newman**	Levine Senior Center	Dahn Jenkins*	Levine Senior Center
Fran Mathay**	Senior Centers		
Lawrence Denney**	Senior Centers		

* Denotes Executive Director ** Denotes Agency Board Member

Outcomes

Outcomes	Items of Interest	Priority
Save money	✓	1
Create synergy	✓	2
Improve business processes	✓	3
Increase appeal to outside funders	✓	4
Increase impact	✓	
Build community capacity	✓	
Enlarge scope of influence	✓	
Enhance accessibility	✓	
Raise awareness of services and providers	✓	



Revised Timeline: Goal is to complete feasibility study by November 1, 2012

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|--|-------------------------|
| • OMB Meeting with Executive Directors | July 23 |
| • Working Group: Draft Project Plan | July 23 – August 1 |
| • Working Group: Share Project Plan with Executive Directors | August 15 |
| • Working Group: Share Project Plan with Steering Committee | August 20 |
| • Conduct Assessments | August 21 – October 15 |
| • Site Visits | October 15 and 16 |
| • Working Group: Draft Report | October 15 – October 24 |
| • Working Group: Share Draft Report with Steering Committee | October 24 |
| • Complete Final Report | October 31 |

Revised Process Steps

Preparation

July 23 – August 20

Phase I – Assessment & Due Diligence:

August 21 – October 15

- OMB Send Questions to Agencies
- Compatibility Assessment
- Review Assets & Liabilities
- Evaluate Legal & Tax Implications
- Decision-point

Phase II – Finalize Report

October 15 – October 31

Phase III – TBD

Broad Assessment Questions

1. What is the staffing model and structure of both agencies?
2. What is the mission of both agencies?
3. Who are the agencies customers (i.e., specific demographics)?
4. What is the overlap and duplication of services?
5. What are the actual activities of both groups?
6. What are the “overhead” costs – management, facility costs, infrastructure (e.g., IT, payroll, etc.) insurance, audit services, etc.?
7. What are the current sources of funding (and amounts) to include restrictions on use? Previous sources of funding?
8. What are the assets and liabilities of each agency?
9. What are additional services that could be provided under a merger or functional consolidation?
10. Additional Questions....



Appendix B: Specialized Programs and Services

Levine Senior Center	Charlotte Mecklenburg Senior Centers
10 Water Classes	A-Z Medicare Classes and Counseling
Ballroom Dance Class	ABCs of Veterans Benefits
Billiards	Breakfast Beauties
Bereavement Support	Breast Health Seminar
Caregivers Support	Consumer Fraud by Phone or Mail
Ceramics Class	Cooking Schools
Cheerleader Class	Deafolina's Support Group
Coffee Klatch	English Language Training
Happy Times Club	Health Screenings
Hula Performers Practice	Hypnosis Workshops
Jewelry Making Class	Jazzercise
Mah Jong	Man Cave
Oil & Acrylic Painting Class	Photo Club
Pilates	Stop Look Listen Safety Workshop Series
Poker	Table Tennis
Presbyterian Hospital Monthly Seminars	Tai Chi
Red Hats Club	V.I.P Support group (visually impaired persons)
Rummy	Vial of Life
Spanish for Beginners	Walking (groups, trails)
Strengthen and Tone-Water Class	Water Color Class
Stroke Support	
TOPS: Take Off Pounds Sensibly	
Veterans Benefits	
Writing your Autobiography	
SilverSneakers Classes	
<ul style="list-style-type: none"> • Cardio Circuit • Muscular Strength Range of Movement • Yoga Stretch 	



Appendix C: SWOT Analysis for Levine Senior Center and Charlotte-Mecklenburg Senior Centers

<p>Strengths</p> <ul style="list-style-type: none"> • History (Either in name or practice) • Reputation in the community • Quality programs • Increase in customer demands (CMSC opened up two locations since 2006 to meet the need) • Continuity of leadership • Certified staff that can deliver services • General favorable perceptions of seniors on agency staff, programs and services 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Inability to provide more services due to lack of funding • Inability to meet increase and demand for service (i.e., Levine’s swimming pool and fitness room are not large enough to meet the demand.) • Inadequate parking at Levine at times. • Outdated computer equipment at both locations • No program director on staff at Levine; no operations director on staff at CMSC • The agency “names” can be a hindrance to receiving funding due to perceptions that the agencies’ funding is sufficient • “Senior” in the agency names may make the agencies less attractive to younger seniors
<p>Threats</p> <ul style="list-style-type: none"> • Both agencies are vulnerable to potential cuts in local, state, and federal funding. • Lack of funding for programs • Potential inability to pay the mortgage balance at the Levine Senior Center • Significant roof and HVAC replacement at the CMSC-Tyvola location 	<p>Opportunities</p> <ul style="list-style-type: none"> • Identify funding/sharing opportunities to increase services delivered off-site • Identify partners that can offer expertise staff lacks • Increase legacy giving • Maximize use of technology • Find ways to better serve even more diverse seniors (to include younger seniors) • Create an endowment fund • Have more fundraising campaigns that promote both agency initiatives and serve as a means of funding for both the Levine Senior Center and Charlotte-Mecklenburg Senior Centers.