

Village Interviews Summary

August 2012

In the past two months, the City Leaders Institute on Aging in Place Leadership Team have conducted interviews with a number of village models from across the United States. Two of the models were located in California, and the rest of the models were located in the Eastern region of the U.S., namely the Northeast. Of the villages that were interviewed, each had established a 501(c)(3) status, a board of directors, and an executive director. Each person interviewed, generally the executive director of the village, stressed the importance of having a number of actual village members on the board of directors.

Another common practice among the villages was having members join on a fee basis. The fees were generally charged annually, though in some of the villages, monthly payments were an option. Additionally, each village strove to provide a way for low-income households, who couldn't afford the membership payments, to become members. Some villages had plans in place, while others were still identifying a way to be able to do so. None of the villages had any significant government involvement, considering both local and federal, short of basic contact with municipality supervisors and local health or aging services representatives to ensure that members who were entitled to government aid received it. Each village's business plan expected sustainability to be reached after a certain number of members had been signed so that the village could be funded in part by memberships, with the remaining costs being covered by funders. Optimal circumstances would be that a village was sustained entirely by membership dues. Between the different villages, membership fees ranged from \$50 to \$750, though the average annual membership fee is around \$580. Villages that have been established for a number of years have been able to decrease membership costs. More recently established villages tend to have membership fees that are higher. Startup costs ranged from around \$125,000 to \$250,000, and were generally funded by a few foundations and establishments, not just one.

Each village noted three types of services as being those that are most demanded: transportation, social activities, and access to a vetted list of vendors. Each village that was interviewed expressed that the service that was demanded more than anything else is transportation. Common transportation services included trips to appointments, grocery shopping (including trips to the store and grocery deliveries), and transportation to and airports. Another common service that villages provided to members is accompanied trips to doctor's appointments, in which the person accompanying the member either takes notes or has a medical background and later advises and provides clarity for the member.

The interviews usually concluded with a number of tips or bits of advice that each village leader had to offer, based on his or her experience in development and implementation of a village. Common tips include the following:

- Partner with local universities and hospitals.
- Build up a volunteer base as quickly as possible.
- Hire interns.
- Conduct surveys with interested older adults to assess what services will be offered.
- Keep the service delivery area as small as possible while taking population density into account.
- Bring on strong-willed and determined individuals as ambassadors for the project who can reach out to others in the community (possibly even having a place for one or two on the board).
- Keep in mind that many older adults see joining a village as a way of admitting that they need to be taken care of, in which case they will need to be approached many times to gain a true understanding of the village movement.
- Plan the village implementation with flexibility.
- Keep the overhead cost as low as possible.
- Consider pre-selling memberships.
- Assess the community well to determine readiness and determination to establish a strong village.
- Only sign vendors who are first recommended and then thoroughly vetted (process would include conducting background checks and verifying insurance).

Susan McWhinney-Morse, Beacon Hill Village/Eastern Massachusetts Village Coalition (Founder and Board Member)

8-5-2012

Background:

- Village definition: a small, nonprofit, entrepreneurial business.
- Basic premise: members should feel free to ask for any service they need; there are no limits.
- Eastern Massachusetts Village Coalition consists of five villages in the area.
- Goal of village network is to link the villages together, and to allow for sharing of activities and services.
- Village created its own business plan.
- Business plan determined how much money to charge each member for the annual fee.
- Needed to raise forty percent of revenue from donations and fundraising and sixty percent from membership fees.
- Currently undergoing a fee schedule remodel.

Management:

- Board consists of 11 members.
- Only village members sit on the board.
- Board members need to be active.

Services:

- Services they offer are varied.
- Most frequently used/requested service is transportation.
- Transportation options start with volunteers.
- Village employs some 24-hour drivers. Each driver undergoes a background check and insurance is verified.
- Some discounts for members with city limousine companies have been negotiated.
- Taxi coupons (cover half of the taxi cost) have also been acquired, though taxi services are not reliable.
- Make sure that members who qualify for federal or city aid can and do get it.
- Try to remain as flexible and responsive as possible with requested/needed services.
- No services have ever been discontinued.
- Mandate: Village members should be provided access to anything they need.

Memberships:

- Discounted fees are offered to low and moderate-income members.
- Cover sheet of tax return is requested to verify need.
- Current fees: \$950/couple, \$750/single.

Vendor Selection:

- Vendors are selected after a recommendation is made.
- After recommendation is received, staff calls to vet the vendor.
- Vetting includes insurance and background checks.

Delivery Area:

- Though demand in the area is growing, delivery area is limited to preserve community atmosphere for the village members. This means that some applicants who are outside of the designated area are encouraged to start their own villages.
- Area is limited to downtown Boston.
- Considered population density when determining delivery area.

Partnerships:

- Village tries to link with well-known, well-run, health service organizations.
- Massachusetts General Senior Health provided significant support in the beginning.
- Local Government: Village tries to remain in contact with city and federal agencies that provide services to the elderly.
- No government involvement beyond state and federal health-related aid.

Demographics:

- Most significant change since the start of the village is an increase in single female members and a five-year increase in the median age of the members.

Marketing:

- Village keeps an active mailing list of area residents who are interested but not yet members.
- People on mailing list receive the periodic newsletter.
- Constantly advertise and put articles in local newspapers, stories on local news programs.
- Recently had a huge *New York Times* article.

Startup Costs:

- Between \$300,000 and \$400,000.
- Costs were high because of experimentation and false steps. They were the first village, so they made some errors along the way.
- Next village to start up after Beacon Hill presold memberships and gained \$200,000 in funding with that method.
- Some villages start up with costs as low as \$30,000 to \$40,000.
- Even if a village starts out with only a volunteer base, eventually employees will need to be hired.

Challenges:

- Number One Challenge: Sustainability.

Advice:

- Board members absolutely need to be village members. They need to have the motivation to get work done.
- Need to make the distinction that villages are not social service agencies. They are “Not here to do unto others, they are here to work together.” Need to stress that villages are NOT competition for anyone.
- There is huge strength in villages coming together.
- Villages that fail were trying to craft themselves as social services agencies.
- Assess readiness of a community to start a village by the commitment of the residents to actively support the work.
- Need to really believe in what you are doing.
- The main factor in being successful is that people want to remain in control and in their communities. Staying at home is a better choice financially and emotionally. People resent the idea that seniors need to be taken care of. They are smart and they can help themselves.

Center for Aging in Place – Laura Traynor Interview Notes

7-24-2012

Brief History:

- Started in Westchester County (outside of NYC).
- The area's aging in place movement started in the county, in the city of Yonkers.
- First village launched in 2008, modeled after Beacon Hill.
 - Differs from Beacon Hill Village in that it is entirely volunteer-run.
- Focuses on social aspect of aging in place.
- 2012: 10 operational programs, each with either a part or full-time executive director and volunteers, with some being entirely volunteer-run.
- The spokes have a total of 1,000 members.
- The spokes all offer three basic services: information and referral, social activities, and transportation.

Center for Aging in Place:

- In essence, it's a hub.
- Provides new communities with startup grants.
- Provides education on fundraising, marketing, PR, technological assistance, tools (focus group guidelines, toolkit), and a database within the network to track each group's progress.
- Struggles with funding (lots of ambition, little funding).
- Can't provide as much support as desired.
- Partners include universities, United Ways, Volunteer Center, assisted living communities, Music Conservatory, healthcare. Universities have been very active with helping to design programs and encourage members to attend classes.

Operations:

- Very grassroots.
- Management structure: one executive director and **seven** members of a board of directors.
- Board of directors has a few members who are very active in the community.
- Work often with interns from local colleges and universities.
- Challenges:
 - Need more governmental support.
 - Eager residents don't want to wait for the government to get on board.
 - Lack of state/local foundations to provide funding.
 - Challenging economic times.
- Opportunities:
 - Lots of interest in the project.
 - Well-educated and experienced population of older adults.
- Eager when it comes to planning the future.
- Human capital is not a problem.

Why Hub and Spoke?:

- Hub can be a 501c3.
- Spokes have more difficulty as a 501c3 due to issues along the lines of bookkeeping and forming a board of directors.
- Center for Aging in Place was always meant to be a Hub and Spoke.
- The hub drives awareness for the spokes with many presentations in a variety of forums.

Governance:

- Executive Director.
- Board of Directors (7).
- Some villages are their own 501c3's.
- Monthly council meetings are convened with all sites and the hub with presentations on cross-cutting topics.
- The board wants the sites to attain their own 501(c)(3) status but the executive director is concerned about that approach due to the cost involved. The hub has served as an incubator.

Successful Program:

- Remaining focused on having primary services be those which the community needs most (information gained by focus groups, surveys).
- Mixed feelings on whether or not individual spokes should become their own 501c3's.
- In a perfect model, the hub would take care of administrative procedures, while the spokes would deal with providing services.
- Individual spokes vet service vendors.
- Hub to coordinate monthly village meetings where all village "spoke" leaders come to discuss challenges and opportunities. Sometimes outside speakers are brought in
- Being able to track what activities that take place in the individual spoke villages in order to show value is key (i.e. database)

Sustainability:

- Expected population was recently retired, older adults (60+).
- Actual population: adults come into program at age 70 or even older.
- Programs have had to adjust to this reality.

Local Government:

- Little involvement.
- Individual spokes are familiar with supervisors of municipalities.
- No government funding (NY State Aging Department funding was originally planned, but it didn't pan out).

Budget:

- Individual spokes charge membership fees.
 - Ranging from \$50 to \$450.

- Sustainability hinges on combination of membership dues, fundraising events, and small grants.
- Spoke annual budget: \$75,000 to \$100,000.
- Hub annual budget: \$125,000.
- Discounted memberships are available due to grants subsidizing the cost.
- Membership fees represent 25 to 30 percent of their budget.
- The hub continues to receive funding primarily from the local foundation that helped to establish the network.
- Recently, the hub started a business network and receives revenue from the dues they pay.
- The hub is focusing more on micro-enterprise to generate more revenue in the future.

Service Delivery:

- Focus groups are key to determining which services are needed.
- Transportation is a big meet that until recently has been covered well by the villages. The focus has been on neighbors helping neighbors. Recently, the demand is outpacing the services available.
- The smaller the better.
- Village that spans too large an area could become an unrealistic prospect.
 - E.g.: volunteer having to travel 10 blocks to aid a community member vs. having to travel 10 miles.

Readiness Indicators:

- Six to ten strong-willed, strong leaders.
- Initiative leaders are generally future members.

Startup:

- Cost: approximately \$125,000.
- Some cost was offset with smaller grants.
- Challenges: finding board members, executive directors, and funding.

Implementation Suggestions:

- Conduct extensive publicity/PR with presentations and community meetings, i.e. senior centers.
- Let local leaders involved (help to get the word out).
- Need to deal with the generational and technological divides.
- Provide outreach to adult children of prospective members in the community.
- Contact Marin County, California as another hub and spoke model.
- Remember that larger service delivery areas create more challenges to recruit members.
- Work with a trusted messenger such as a place of worship when starting work in a new area.

Resources available to other Villages and Aging in Place Communities:

- Copy of the Center for Aging in Place Toolkit or sections of it
- Focus group, survey, and forum questions and format

Coral Gables (Terminated Village) – Jerry Santeiro Meeting Notes

8-6-2012

Background:

- Visited Beacon Hill Village in 2008 to decide if village was right for Miami area.
- Began working on business model.
- Acquired \$250,000 in funding from a single funder.
- Funder gave money in installments: half to start, then second half was given quarterly as the village founders met certain benchmarks in the process.
- Raised funds to award 10 annual memberships to members who couldn't afford the costs. Memberships paid for an entire year's.
- Goal was to achieve 300 members to break even on their budget and ensure the sustainability of the village. This would have resulted in 60 percent of costs being covered by membership fees and 40 percent being covered by the funder).
- The village did start an ongoing fundraiser to raise revenue.
- Village membership reached 130 before it was terminated.
- Project launched in September 2008.
- May 6, 2011 was the official termination date of the village.
- Focus of the original business model was to attract volunteer drivers.
- Ultimately couldn't get enough volunteer drivers and were forced to hire drivers.
- Got 501(c)(3) status one month before termination. Having this earlier would have helped in fundraising. Other funders didn't want to fund another foundation.
- Made sure to terminate project before all the money was gone to refund members who had paid for a full year of services.
- Fee: \$600.00 per household. A monthly payment option was offered. There was not a single individual option.

Partnerships:

- Partnered with local rotary club.
- City donated a car (sedan) to provide transportation service because members did not want to ride in a van.
- Local news stations and newspapers ran multiple stories and articles.
- Reached out to local organizations and places of worship, but with little success.
- Partnered with the University of Miami and a local hospital (part of a private Baptist hospital chain).
- City news networks and newspapers provided outreach media.

Members:

- Population is approximately forty percent Hispanic in the Miami area.
- Multigenerational aspect of Hispanic families affected the level and kinds of services needed. Families often provided for their own needs and did not require or want as much service. As a result, the village wasn't able to get a proportionate share of Hispanic households to join.

- Memberships were not presold. The village tried to deliver services to members as soon as they joined.
- When members signed up, they were given a form to fill out that would assess which services were considered most needed among the members.
- Attempted to form a virtual town hall to address these issues.

Services:

- Funder insisted that the entire city be covered by the village, though planners recommended delivering to a smaller area. The most concentrated area was in the northern part of the city.
- The most demanded service was transportation.
- Two grocery trips per week or two grocery orders and deliveries were offered.
- Unlimited transportation to doctor's appointments and airports were offered.
- Access to vetted list of vendors providing household services was provided.
- Accompanied trips to doctor's appointments were offered.

Advice:

- Keep overhead cost as low as possible. High costs such as the salary for the Executive Director and possible the economic climate during 2008 contributed to the village's downfall. It may have been better to have a lower salary or work more through volunteers initially.
- Stretch initial funding for as long as possible.
- Gather a volunteer base early on. Address liability issues.
- Consider pre-selling memberships to build a good financial base.
- Survey the community and conduct research to identify the needs and preferences of the target population.
- Limit the service delivery area. This will reduce costs and ensure a better market saturation.
- Limit the number of trips and other services that are offered weekly or monthly. Unlimited trip offers also contributed to the Coral Gables village's problems.

Staff Observations

- Requirements from the funder may have hampered the ability of the village to develop a good business model. For example, the village wanted to narrowly define its service delivery area and the funder mandated citywide coverage.
- Additional research and surveys might have helped them tailor their services and revenue more accurately.
- The impact of the high concentration of a Hispanic population is an important consideration for the Greater Phoenix region.

Floy Biggs, Community Senior Services Phone Interview Notes

7-26-2012

Project Overview:

- Community Senior Services: 501(c)(3) providing free services to the Greater Inland and East San Gabriel Valleys areas' senior citizens for the last thirty-seven years.
 - Consists of eight (free of charge) core programs and one village program, REAL Connections.
 - Historically provided lower-income families with free services.
 - Took on more of a business model in 2008.
 - Business model led to development of a strategic plan, accompanied by an assessment of the provided services. The services assessment eventually led to the idea of implementing a village based off of the Beacon Hill model.
 - Procured federal and state funding
 - Transition to providing fee-based services to village members was challenging.
- REAL Connections (Village Project):
 - Focus: provide fee-based services to middle-income, 55+ population (median income: \$75,000).
 - Membership-based.
 - Currently, no subsidized memberships in the program.
 - Management: REAL Connections is overseen by the "hub," Community Senior Services. The Community Senior Services Board of Directors acts as the board for REAL Connections. Additionally, REAL Connections has its own Advisory Board.
 - Advisory Board consists of mostly charter members who act as REAL Connections ambassadors. They are the "movers and shakers."
 - Partnered with local Pomona hospital (helped hospital deal with readmission rate).
 - Partnered with local retirement communities (after establishing that REAL Connections was NOT competition for the retirement communities) to share services such as handymen and aquatic centers.
 - In 2009, conducted survey with local older residents to determine what services were currently being offered to older adult population, if they were willing to pay for services, and if so, how much they were willing to pay.
 - Program officially launched July 2012.
 - Currently has 40 members.
 - Serving eight cities (hopefully there will be one spoke per city, but smaller cities might be combined).
 - One official REAL staff member, the Member Services Director. Other staff comprised of paid and unpaid volunteers and interns (from local colleges).

Funding:

- Initial funding: secured \$15,000 from Pomona Valley Hospital Medical Center and \$15,000 from Community Health.

- Presented business plan (developed after analyzing 2009 survey results) to Pomona Valley Hospital Medical Center and Inter Valley Health Plan (both are partnered with Community Senior Services on project). Each donated \$150,000 over a period of three years.
- Archstone Foundation: \$150,000 over period of two years.
- 40 percent of budget covered by membership fees.
- Membership dues: \$550 for a single member, \$780 for a couple.

Local Government:

- Supportive, but plays no key role.
- Has representation on Board of Directors.

Services:

- #1: Transportation.
- Doctors' appointments.
- Grocery shopping.
- "Med Pal"- partner (preferably with some medical experience) accompanies member to doctors' appointments to take notes.
- Services have to be limited per month. Two appointment trips and two grocery trips are provided per month. Notice of at least 24 hours is required.
- Social events (member interest is strong in this area).
- Resources Directory.
 - Senior Help Line: provides information on services and resources available to members.
 - List of vendors.
 - Vendors must be vetted, recommended, and fingerprinted.
 - Problem: many local vendors (e.g., handymen) are not licensed.
 - Ideal vendor: vetted, licensed, recommended, and fingerprinted.
- Delivery area:
 - Spans area of four core cities.
 - Survey determined service delivery area.

Challenges:

- Main start-up challenges: finding and vetting volunteers (background checks are part of the process).
- Getting potential members on board, and getting rid of the idea that village services are for old, frail individuals. Promote village benefits, such as: leading a healthy, active lifestyle while being more connected within the community.

Recommendations / Advice:

- Partnering with acute hospitals is key.
- Partnering with local colleges.
 - Access to potential interns. Interns are crucial to REAL Connections.

- Interns are young, eager to help.
 - Fosters intergenerational connections.
- Establish advisory board as soon as possible.
 - Advisory Board members are ideally charter members (should be financially invested in the project).
- Get local retirement communities on board (leaders and residents).
 - Provide shared services, recommend vendors.
- Easier to get started if 501(c)(3) status is already established.
- Need to portray the Village movement well – it's not about being old and frail.
- Fundraising is a major effort – memberships are hard to get.
- Engage business through social accountability to raise money.

Caroline Coskinas, WISE and Healthy Aging Phone Interview Notes

7-27-2012

Background:

- WISE and Healthy Aging has been providing services to senior citizens and their families in the West L.A. area for 45 years.
 - Headquartered in Santa Monica, CA.
 - Works very closely with cities.
 - Approached with idea of starting a village about five years ago.
 - Planning for village began about three years ago.
 - Village has been operational for about a year and a half.
- They started research in three years ago and launched as a hub and spoke model one year ago.
- Village Project: WISE Connections
 - WISE and Healthy Aging acts as the hub.
 - Hub coordinates human resources, financing, marketing, communications, IT, etc.
 - Spokes located in existing neighborhoods to preserve community atmosphere.
 - Hub has leadership advisory council with representation from each spoke.
 - Originally had separate governing councils for each spoke. Transitioned to having one inclusive advisory council to promote synergy.
 - Current total of members among all spokes: 125 members.

Funding:

- City of Santa Monica provides funding to subsidize membership fee for members with limited resources.
 - Provides scholarship money for a certain number of Santa Monica residents. Scholarship pays the membership dues and awards a stipend for service fees and social event fees.
 - Scholarships are income-based. Individuals with less than \$30,000 in total income are eligible for full scholarships; those with less than \$40,000 in total income are eligible for partial scholarships.
 - Initial annual membership fees ranged from \$500 to \$800.
 - Current annual membership fee: \$365 (\$1 per day) per individual, \$475 for a couple. This will discontinue soon.
- The hub used a membership discount offer to get people on board.
- Costs are centralized at the hub.
- Funding is allocated (by the hub) equally between spokes.

Sustainability:

- Goal: self-sustained based on member fees.
- Fees currently cover one-third of the budget.
- Estimated current budget: \$130,000.
- Remaining two-thirds of the budget are covered by the city of Santa Monica and ArchStone.

Partners:

- Local organizations and businesses.
- Approach local businesses to sponsor services for low-income members.
- Approach local nonprofits about providing daily services (e.g. daily phone check-ins).
- Vendors are referred by leadership advisory council and thoroughly vetted (process includes licensing and reference checks).

Community Support/Involvement:

- Gained by getting the word out in various ways, such as: working with neighborhood associations, attending block parties and local fairs, approaching religious organizations (though there has been little success with religious organizations).
- Appointing members as neighborhood ambassadors.

Services:

- First step: Conduct research to determine interest in villages. Survey to evaluate needs and interests in the community (determines which services to deliver).
- Survey sent out with interest card. Approximately 200 responses were received. Responses were additionally used to begin building a database.
- Beginning phase involves a lot of one-on-one conversations, or “living room chat” focus groups.
- Wide range of services are offered, primary services are transportation and social services.
- Three to five social activities per month are consistently offered.
- Social events and services have proven to be a huge draw for potential members.
- Biggest need is transportation. It is also the hardest need to address in the L.A. area (traffic issues). Hard to find transportation volunteers due to liability issues.

Challenges:

- Getting members.
- The concept of villages is hard to understand.
- If people have been getting services for free, they are less likely to want to pay for them.
- Getting people past the “I don’t need help, I’m not old” mentality.
- Marketing is tough because it is relative person-to-person. Best marketing is by word-of-mouth.

Advice and Recommendations:

- Once initial members, or “founders,” are established and the business plan is operational, people will begin referring the village to friends.
- Make sure the village “pre-sells” memberships before the project officially launches.
- Get “founders” to act as spokespeople, or neighborhood ambassadors.
- As a nonprofit, make sure that communities are serious about being involved. Communities need to be engaged and committed to the village program.
- Need to establish clear expectations of roles.

- Plan to build things with flexibility to leave room for adjustments.
- Have necessary policies and procedures in place.