AGING IN PLACE COMMUNITIES

By: Nicole Dube, Legislative Analyst II

You asked for information on resident-formed nonprofit groups in Connecticut and other states that provide support and assistance to seniors, enabling them to remain in their own homes as they age. You also asked us to identify potential grant sources for your constituents who want to form such an organization.

SUMMARY

“Aging in place” initiatives provide seniors with the necessary support services to remain in their own homes as they age, allowing them to delay or avoid entering assisted living facilities. In some communities, elderly residents themselves are forming “aging in place” or “virtual retirement” communities by establishing nonprofit membership organizations that negotiate and obtain shared services and programs for their members.

Members pay an annual fee to access a range of home-based services including: transportation, meals, companionship, social and wellness programs, home maintenance and repair, and technology assistance. Some services are included in the membership fee and others are provided by a network of pre-screened providers at a discounted rate.

We contacted organizations in Massachusetts, Connecticut and Washington, DC. Each is a nonprofit membership organization formed by elderly residents. Service and membership fees vary across organizations, but are generally much lower than the cost of moving into an assisted living facility.

These organizations identified leadership, adequate funding, and assessment of the community's needs as critical factors to achieving success. Some organizations offer consulting services and publications for a fee to groups interested in starting an aging in place community.

MASSACHUSETTS

Beacon Hill Village

Beacon Hill Village (BHV) was established in 2002 and is considered to be the model for nonprofit, “aging in place” membership organizations. Membership is available to residents of central Boston age 50 and older. It currently has 450 members who pay an annual fee of $580 for an individual and $850 for a household. BHV also has a “Membership Plus” program for low-income residents age 60 and older that is funded through donations and local foundation grants. These residents pay a reduced annual membership fee of $100 per individual and $150
per household. They also receive a $250 gift certificate to pay for services and programs not included in the membership fee.

The organization is funded by membership dues, board and community donations, and local foundation grants.

BHV offers its members a variety of services, some of which are included in the annual membership fee, while others are provided at discounted rates by pre-screened providers. Table 1 describes these services.

Table 1: BHV Services

<table>
<thead>
<tr>
<th>BEACON HILL VILLAGE SERVICES</th>
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<tbody>
<tr>
<td><strong>Information and Referrals</strong></td>
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<tr>
<td>Transportation</td>
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<tr>
<td>Individual and group rides</td>
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<tr>
<td>Volunteer Programs</td>
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<tr>
<td>Within and outside the BHV community.</td>
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<tr>
<td><strong>Household Services</strong></td>
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<tr>
<td>Home repair, cleaning, errands, and home office assistance.</td>
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<td><strong>Wellness Programs</strong></td>
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<td>Physical fitness evaluations, special classes at local fitness clubs, and wellness seminars.</td>
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<tr>
<td><strong>Meals and Groceries</strong></td>
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<tr>
<td>Weekly grocery shopping, home delivered meals, and dining groups.</td>
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<tr>
<td><strong>Concierge Services</strong></td>
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<tr>
<td>Light housework, mail packages, bring car in for repairs, pick up tickets for events, water plants and pick up mail during vacation, and wait for a repair person.</td>
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<tr>
<td><strong>Health Care and Home Health Services</strong></td>
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<tr>
<td>Assisted living services, long term care insurance discounts, expedited access to Massachusetts General Hospital Senior Health practice.</td>
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<tr>
<td><strong>Social and Cultural Activities</strong></td>
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<tr>
<td>Regular trips and events, educational seminars, home computer classes, individual and group travel.</td>
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Source: [www.beaconhillvillage.com](http://www.beaconhillvillage.com)

BHV is staffed by a full-time executive director and member services director. Part-time staff include a program director, outreach coordinator, office manager, and bookkeeper. Staff contact members monthly to ensure their satisfaction with services and programs. They also publish a quarterly newsletter mailed to all members.

**Cambridge At Home**

Cambridge At Home (CAH) was founded by Cambridge residents in October 2007. The program, which is modeled after BHV, currently has 235 household memberships representing 350 individuals. Members must be at least 50 years old and reside in Cambridge. Currently, members pay an annual fee of $900 for an individual and $1,200 for a household. According to executive director Kathy Spirer, CAH is funded by membership dues and annual contributions of approximately $65,000 from its 12 trustees.
Like Beacon Hill Village, CAH offers members a combination of free and discounted services provided by its vendor network. All vendors must complete a background and criminal offender record information (CORI) check. The following services are included in the annual membership fee:

1. information and referral;
2. weekly grocery shopping service by appointment;
3. exercise classes and a walking group;
4. monthly CAH-sponsored programs;
5. access to volunteers who provide home visits, companionship, and transportation to medical appointments;
6. social interaction with other members through home-based activity groups;
7. volunteer opportunities both within and outside the CAH community; and
8. facilitated access to health and home care services provided by CAH's community partners.

Members may also access additional services through the CAH provider network at a discounted rate. Services include transportation, home repair and maintenance, meals, wellness, and concierge services.

CAH is staffed by a full-time executive director, membership coordinator, and activities coordinator. Committees of trustees and members volunteer in the main areas of the program: daily living, health and fitness, and organized activities.

CONNECTICUT

Staying Put in New Canaan

Staying Put in New Canaan (“Staying Put”) was established in October of 2007 by a group of local residents. Based on the BHV model, it currently has 133 household memberships representing 192 individuals. Members must be at least 50 years old and pay an annual membership fee of $360 for an individual and $480 for a household. It is currently building an endowment to help subsidize membership costs for low-income seniors.

When determining what services to offer, Staying Put's steering committee developed a survey in January of 2007 and sent to over 150 potential members to assess service priorities. This survey was developed in response to a 2006 needs assessment of New Canaan's elderly population conducted by the local Department of Health and Human Services. The committee felt it was important not to duplicate services already available through other organizations and to facilitate participation in these existing programs.
Members access services through Staying Put's resource center, which is staffed by an executive director and volunteers. The resource center provides information, counseling, and referrals through a network of pre-screened providers. Services include transportation, assistance with shopping and errands, social outings and events, and technology assistance (cell phones, computers, etc.). Staying Put uses high school volunteers to assist with small tasks such as shoveling snow or light home cleaning. It also provides members with a list of recommended home health care, assisted living, and home maintenance and repair providers.

**At Home in Greenwich**

Based on the BHV model, At Home in Greenwich was established in February 2008. Members must be at least 50 years old and pay an annual fee of $500 per person and $650 per household. The program currently has 100 members.

The program offers members a combination of free and discounted services provided by its pre-screened vendor network. Services include transportation, home repair and maintenance, health and home care, meals, social and wellness activities, and concierge services.

**WASHINGTON, DC**

Capitol Hill Village (CHV) was founded by a group of District residents to support community members desiring to remain in their own homes as they age. It was established in October 2007 and currently has 148 household memberships representing 210 people. Members may be any age, but they must reside within certain geographic boundaries in the District's Capitol Hill area. The program is staffed by an executive director and volunteers who provide office support and service coordination.

Members currently pay an annual fee of $500 for an individual and $750 for a household to access services and referrals. CHV also offers a “Membership Plus” program for low-income residents based on available funding. In addition to the program's residence requirement, applicants must also meet annual income limits of $40,000 or less for an individual and $50,000 or less for a household. Applicants who meet the above income limits receive annual gift certificates ($250 per individual and $375 per household) to use with CHV preferred vendors when volunteers are unavailable to provide requested services. And their annual membership fees are reduced to $100 for an individual and $200 for a household. According to executive director Gail Kohn, CHV is unable to cover its costs solely with membership dues and must also rely on donations and small local grants.

CHV relies primarily on volunteers (both members and non-members) to provide services to its members. Volunteers must submit to a criminal background check and report to a specific volunteer coordinator (e.g. transportation coordinator). To access services and referrals, members email or call a single telephone number. Free volunteer services include:

1. transportation;
2. in-home assistance such as meal preparation, companionship, organization, and help with paperwork;

3. gardening;

4. convenience services, such as running errands or waiting for deliveries;

5. technical support, such as assistance with computers, cell phones, DVD players;

6. medical advocacy, including attending medical appointments and taking notes; and

7. light home maintenance such as minor repairs and shoveling walkways.

If a volunteer is unable to provide a requested service, CHV refers members to prescreened, “preferred vendors” who offer services at discounted rates. Preferred vendors include plumbers, electricians, handymen, painters, builders, and gardeners. CHV also maintains partnerships with local organizations to provide discounted home healthcare services, classes, and community events. CHV follows up with members to determine their satisfaction with volunteers and vendors.

CHV provides its members with a monthly newsletter and a calendar of events and activities. It also arranges and provides transportation to social and educational events for members.

**POTENTIAL PRIVATE GRANT FUNDS**

Our preliminary research shows that major resources for finding private grants include several websites and other resources which your constituents could access, sometimes by becoming subscribers, to look for grants that meet their particular needs.

The Connecticut State Library (CSL) is a good place to start (860) 757-6570 – general reference). The library also has a Grantsfinder website, which could be of use, at:

http://connexion.oclc.org/WebZ/XPathfinderQuery?sessionid=0; term=7344; xid=CZL

The Hartford Public Library has other grant resource materials not found at CSL.

Other Internet resources include:

http://www.ctphilanthropy.org/o/ccp_home-page.asp

http://www.foundationcenter.org/


Your constituents may also try contacting local philanthropic organizations or foundations that could be a source of grants.
STARTING AN AGING IN PLACE COMMUNITY

We asked the staff of the programs we contacted to identify the most important factors for residents to consider before establishing an aging in place community.

Assessing Community Needs

Residents must first consider whether an aging in place initiative is appropriate for their community. Each community's needs vary in terms of geography, potential member interests, and existing services and providers. CHV’s Gail Kohn notes the importance of having a large elderly population from which to draw members, particularly those with higher incomes. Aging in place communities generally rely on a substantial base of higher income seniors who are able to pay full membership dues and fees for referred services.

Leadership

All organizations stressed the importance of having founding members and trustees with dedication, endurance, and an understanding of members' needs. CAH relied heavily on its board members during the planning process for consulting, market research, and completing the 501c3 application process. CAH's Kathy Spirer discourages communities from hiring consultants to assist in the process, feeling its completion without outside assistance is an essential part of building an aging in place community and getting to know prospective members.

Staying Put's Jane Nyce suggests that a board of directors include individuals with business experience and community connections that enable them to assist in fundraising and program promotion.

Funding

Organizations also noted the importance of creating a long-term financial plan before implementing an aging in place community. Start-up and operating funds can be difficult to obtain, and most organizations rely on private donations from their founding members and community organizations. According to Spirer, CAH received its $150,000 start-up funding from trustee donations. These programs also suggest applying for local grants to assist with program costs and to subsidize membership fees for low-income residents. However, Spirer notes that it is important not to rely on charitable donations and grant funding as they fluctuate each year. Programs must build a solid membership base, accurately project future costs, and invest fees so they can fulfill their obligation to provide services into the future.

Additional Resources

Some aging in place communities offer publications and consulting services to groups interested in forming their own organizations. BHV publishes a comprehensive founder's manual and DVD, which can be ordered at www.beaconhillvillage.org. CHV also sells a publication of its policies and procedures, which can be ordered by calling (202) 543-1778. CAH offers
consulting services and a free publication of its general guidelines for starting an organization (see attached).

According to Marilyn Chou, president and founder of At Home in Greenwich, Fairfield and West Chester county residents recently formed a coalition that meets bi-monthly to provide support and assistance to residents seeking to establish aging in place communities in Connecticut. For more information, please contact Ms. Chou at (203) 863-9655.

HYPERLINKS


