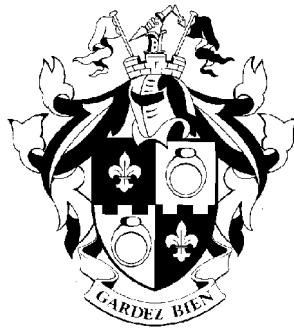


NATURALLY OCCURRING RETIREMENT COMMUNITIES AND NEIGHBORHOOD VILLAGES



OFFICE OF LEGISLATIVE OVERSIGHT
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As the baby boom generation ages, the number and proportion of seniors in the United States and Montgomery County will rise accordingly. In 2005, seniors (people age 65 and over) represented 12% of the total County population; by 2030, the percent of seniors is projected to increase to 17%.

Seniors consistently express a preference for “aging in place” – meaning they want to remain in their current homes or current communities as they age, rather than enter age-restricted communities (e.g., Leisure World), assisted living, or nursing homes. Based on the County Council’s interest in learning more about service delivery to seniors aging in place, this report by the Office of Legislative Oversight examines two types of programs in Montgomery County that deliver these types of services: “naturally occurring retirement community” supportive services programs and neighborhood “villages.” The report also describes the County Government’s efforts to support these programs.

As a concept, aging in place focuses on both *where* a senior lives and *how* a senior lives – highlighting quality-of-life issues such as health; housing; safety; and opportunities for education, recreation, volunteering, and socialization. Seniors who age in place face many common challenges:

Personal Care	Decreased mobility can result in a need for assistance with personal care.
Transportation	Seniors often rely on others for all transportation needs.
Health Care	Seniors often lack access to health care from transportation or financial limits.
Home Repair and Maintenance	Home repair and maintenance tasks may become increasingly difficult or impossible for seniors.
Safety	Safety challenges may include difficulty hearing smoke detector alarms and difficulty quickly exiting homes; falls; and vulnerability to crime.
Community Involvement	Health needs, decreasing mobility, and limited transportation may challenge seniors’ ability to stay involved in their communities.
Appropriate Housing	Seniors may have difficulty navigating inaccessible homes or keeping up with mortgage/rent payments, property taxes, or home maintenance costs.

Naturally Occurring Retirement Communities

A “naturally occurring retirement community” (known as a NORC) is a community that naturally evolves over time to include a relatively large concentration of senior residents. In most academic literature, seniors in a NORC make up at least 40 to 65 percent of the population and range from 50 to 65 years old. NORCs can develop in neighborhoods, apartment or condominium buildings, or even in rural communities. Unlike a planned retirement community, a NORC develops naturally either when seniors age in place or when seniors move into a non-age-restricted community.

In an effort to capitalize on economies of scale, some organizations and local governments around the country have developed programs to deliver services directly to seniors in NORCs.

Naturally Occurring Retirement Community Supportive Services Programs

A NORC supportive services program (NORC-SSP) is a program model for delivering services to seniors who live in naturally occurring retirement communities – bringing together entities such as social service providers, health care providers, transportation providers, and residents to provide services and programs for residents in a NORC. Examples of services provided include:

- Social work case management
- Mental health services
- Home care
- Meals
- Transportation
- Social and cultural events
- Bereavement support
- Exercise classes

NORC-SSPs receive funding from private sector contributions; charitable donations; resident membership or activity fees; and federal, state, and local grant funding. A 2004 federal government report highlighted concern among experts for identifying sustainable funding for NORC-SSPs.

The same 2004 report emphasized that NORC-SSPs are only one component of a broader approach to meeting the needs of an aging population, and communities should not expect them to take on the full burden of meeting the changing needs of aging residents.

Neighborhood Villages

Some communities or neighborhoods are developing grassroots organizations to provide services to seniors aging in place in their communities or neighborhoods; these are commonly referred to as neighborhood “villages.” A community in Boston, Massachusetts organized the first village – Beacon Hill Village – in 2001. Communities that form villages are not necessarily NORCs because they may lack the high concentration of seniors found, by definition, in a NORC.

Some villages provide services or programs only for members who pay annual membership fees while other villages provide services and programs without charging for membership. Some villages set a minimum age for membership. Villages often rely heavily on neighborhood volunteers to help provide services, which vary significantly among villages. Common services provided by villages are:

- Transportation
- Friendly visits or phone calls
- Social and educational programs
- Assistance with household repairs and maintenance

Villages also face challenges finding sustainable funding. Some villages charge annual membership fees while other villages seek funding from other sources.

In Montgomery County, the non-profit community and private community members have driven the efforts to develop NORC-SSPs and neighborhood villages. Only one organization in Montgomery County – the Jewish Federation of Greater Washington – has developed and operated a NORC-SSP while several Montgomery County neighborhoods have developed or begun to develop neighborhood “villages” to help local seniors age in place.

Community Partners

In 2003, the Jewish Federation of Greater Washington established a NORC-SSP – called Community Partners – a collaboration of six non-profit organizations providing services to seniors residing in buildings identified as NORCs. Between 2003 and 2008, the program provided services at various times in nine different buildings; the services included access to social workers, recreation/social/exercise programs, transportation, and health and wellness seminars and clinics.

Funding for the Community Partners program came from \$2 million in federal government grants and \$500K in non-competitive County Government contracts, which were awarded as required matching funds for the federal grants. Federal funding ended in June 2009; consequently, Community Partners became a fee-based membership organization open to all County seniors, ending its services in NORC-designated buildings. Current programming includes access to social workers, recreation/social programs, and programming at some senior kosher nutrition sites.

Montgomery County Neighborhood Villages

Several Montgomery County neighborhoods have begun to organize “villages” to assist seniors living in the neighborhoods. The neighborhood around Burning Tree Elementary School in Bethesda was the first Montgomery County neighborhood to organize a neighborhood village – called Burning Tree Village (BTV). BTV does not charge residents for its services, which are expected to grow over time to include neighbor-to-neighbor assistance; concierge services; a medical component; education activities; and social activities.

Numerous other County neighborhoods have followed BTV’s example and are creating or exploring a village or a similar but less formal organization. Neighborhoods include Bannockburn, Cabin John, Carderock Springs, five Chevy Chase municipalities, Fallsmead, Fleming Park, Garret Park, Kenwood Park, Somerset, and Stonegate.

County Government Support for NORC-SSPs and Neighborhood Villages

The County Government has financially supported the Community Partners program and several County Government offices have worked closely with and supported the efforts of the County neighborhoods developing village programs.

Type of Assistance	County Government Office		
	Office of Community Partnerships	DHHS’ Aging and Disability Services	B-CC Regional Services Center
Providing expertise and guidance	✓	✓	✓
Helping develop a neighborhood survey		✓	
Copying and mailing neighborhood survey and helping analyze survey results		✓	
Providing grant money to defray start-up and administrative costs			✓
Facilitating discussion of villages among County neighborhoods (forums, newsletter, listserv, volunteer training)			✓
Photocopying			✓

RECOMMENDATIONS

OLO offers four recommendations to the Council aimed at enhancing the Council's understanding of County Government support for programs providing services to seniors aging in place.

#1 Request an update from the Montgomery County Planning Department on the demographics of County seniors as soon as the 2010 U.S. Census data become available.

For this report, OLO used the most recent demographic data about seniors in the County - a combination of the 2000 U.S. Census and the 2005 Census Update Survey. Beginning next year, the U.S. Census Bureau will conduct the 2010 Census, and the newer data will become available beginning in 2011.

#2 Monitor the development of neighborhood villages and the County Government's support of these programs. Specific questions for the CAO to address should include:

- a. Which County neighborhoods or communities are operating villages or similar organizations? How are these organizations structured? How many residents have requested or been provided services?
- b. Which County neighborhoods or communities are exploring development of a village?
- c. How are County Government departments or offices currently involved in the development of villages?

#3 Convene an HHS Committee worksession with Executive Branch and community representatives to discuss the County Government's policy and role regarding Montgomery County seniors aging in place. Specific questions to discuss include:

- a. How should the County Government define "aging in place" for policies or programs related to senior aging?
- b. What is the full range and cost of services that the County Government provides to help seniors age in place?
- c. Are there data available to measure the extent to which the demand for services to assist seniors aging in place is being met, also considering programs and services available via public, private, and non-profit sectors?
- d. Given the likelihood of an increasing demand for these services, should the County develop a policy for guiding the design and offerings of County programs and services aimed at helping seniors age in place?

#4 Identify additional requests for research and analysis related to meeting the needs of the County's senior residents.

OLO recognizes that the Council's discussion of NORC-SSPs and neighborhood villages is likely to spark broader questions related to how the County Government is serving the needs of the County's seniors. OLO recommends the Council use this opportunity to compile a list of the Council's requests for research and analysis needed for future discussions about meeting senior residents' needs. OLO will then work with central Council and Executive Branch staff to provide the requested information back to the Council in a timely manner.

**NATURALLY OCCURRING RETIREMENT COMMUNITIES AND
NEIGHBORHOOD VILLAGES**

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CHAPTER I. Authority, Scope, and Organization of Report

A. Authority

Council Resolution 16-673, *Fiscal Year 2009 Work Program of the Office of Legislative Oversight*, adopted July 29, 2008.

B. Scope of Report

As the baby boom generation ages in the coming years, the proportion of seniors (persons age 65 and over) in the United States will rise accordingly. Montgomery County's demographics mirror those in the country at large. Numerous studies report that an overwhelming number of seniors desire to "age in place" – meaning that they want to stay living in their homes or current communities as they age, rather than enter age-restricted senior communities, assisted living facilities, or nursing homes.

Based on the County Council's interest in learning more about service delivery to seniors aging in place, this report by the Office of Legislative Oversight (OLO) examines two types of programs that have developed in Montgomery County to provide services to seniors aging in place: "naturally occurring retirement community" (NORC) supportive services programs; and neighborhood "villages."

C. Organization

Chapter II, Introduction to Aging in Place, defines aging in place and summarizes the challenges commonly cited by seniors who age in place.

Chapter III, Two Models for Delivering Services to Seniors Aging in Place, describes two different models for providing services to seniors who are aging in place: supportive services programs in naturally occurring retirement communities; and neighborhood "villages."

Chapter IV, Demographic Data on Seniors in Montgomery County, reviews demographic data on the County's population of seniors, including the latest forecast of increases in the number of senior residents.

Chapter V, Naturally Occurring Retirement Community Supportive Services Programs and Neighborhood Villages in the County, describes the program in Montgomery County that provides services to seniors in naturally occurring retirement communities and the County's neighborhoods that have created village programs to help senior residents age in place.

Chapters VI, County Government Support for Naturally Occurring Retirement Communities and Neighborhood Villages, describes the County Government's efforts to support the various aging-in-place initiatives launched by non-profit organizations and community members in the County.

Chapters VII and VIII present the Office of Legislative Oversight's **Findings** and **Recommendations**.

Chapter IX presents **Agency Comments** received on a final draft of this report.

D. Methodology

Office of Legislative Oversight staff members Leslie Rubin, Jennifer Renkema, Sarah Downie, and Richard Romer conducted this study. OLO gathered information through document reviews; data analysis; interviews with County Government and Maryland-National Capital Park and Planning Commission staff; and interviews with community program organizers and community members.

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CHAPTER II. Introduction to Aging in Place

Many seniors residing in Montgomery County – similar to seniors elsewhere – prefer to stay in their homes or current communities as they age, rather than enter age-restricted senior communities, assisted living facilities, or nursing care. This generally shared preference to “age in place” presents a variety of issues related to housing, health care, safety, and community involvement for seniors.

Numerous studies emphasize the need for communities to develop or expand infrastructure to deliver services to this growing senior population that wants to age in place.¹ One study observed that:

The vast majority of Americans want to age in their homes and communities for as long as possible. However, the aging of the population will pose new challenges for the delivery of local services such as health care, recreation, housing, transportation, public safety, employment and education. While these services assist a broad segment of the population, they also have a major impact on the quality of life of older Americans.²

This chapter identifies and describes issues common to seniors aging in place:

- **Section A** describes the trend for seniors to age in place in their homes; and
- **Section B** summarizes common challenges for seniors aging in place.

Chapter III (beginning on page 6) describes two models for providing services to seniors who choose to age in place.

A. Aging in Place

Although there is no one agreed-upon definition of “aging in place,” the term generally refers to seniors choosing to stay in the same home or community that they have lived in for many years. In general, aging in place excludes seniors who move from their home to a planned, age-restricted community (e.g., Leisure World) or assisted living or nursing facility, but can include seniors who move to a smaller home in the same community.

Some discussions broaden the aging-in-place concept to “aging in community,” moving beyond the idea that seniors who stay in the community necessarily stay in a home owned for a long period of time.³ As a concept, aging in place focuses on both *where* a senior lives and *how* a senior lives – highlighting quality-of-life issues such as health; housing; safety; and opportunities for education, recreation, volunteering, and socialization.⁴

¹ *A Blueprint for Action: Developing a Livable Community for All Ages*, Aging in Place Initiative at p. 1 (2007) [hereinafter “*A Blueprint for Action*”]; *The Maturing of America: Getting Communities on Track for an Aging Population*, Aging in Place Initiative at p. 1 (2006) [hereinafter “*The Maturing of America*”]; Dalrymple, E., *Livable Communities & Aging in Place: Developing an elder-friendly community*, Partners for Livable Communities at p. 2 (2005); *Beyond 50.05 Survey*, AARP at p. 85 (2005).

² *The Maturing of America* at p. 1.

³ See Blanchard, J., *From Aging in Place to Aging in Community: Finding the Third Way*, Maximizing Human Potential, Vol. 16, No. 1 (2008); Moran, J. and Rollins, P., *Aging in Community: How the Coming Baby Boom Generation will Transform Traditional Models of Independent Living*, at http://www.terrain.org/articles/20/moran_rollins.htm.

⁴ See, e.g., *A Blueprint for Action*; *The Maturing of America*; National Aging in Place Council: <http://www.naipc.org>; Senior Resources for Aging in Place: <http://www.seniorresource.com/ageinpl.htm>.

National studies show that seniors are choosing to age in place. Over the last 20 years, the rate of nursing home residence among persons over age 65 has declined.⁵ According to a federal Administration on Aging study, in 2007, only about 4% of persons age 65 and over (1.6 million) lived in institutional settings, such as nursing homes.⁶ While this percentage increases for persons age 85 and over (15%), the study found that persons age 65 and over are less likely to change residence than the under 65 population. From 2006 to 2007, those that did move primarily stayed in the same county as their previous residence (58%), and 79% remained in the same state.

Studies of seniors both nationally and in Montgomery County indicate that most seniors prefer to age in place. For example, a 2005 study by the American Association of Retired Persons (AARP) found that among people age 65 and over:

- 93% want to stay in their current homes for as long as possible;
- 65% had lived in their current communities for at least 20 years;
- 88% want to be in the same local community five years later; and
- Only 16% lived in an age-restricted community.⁷

A 2005 study of Montgomery County residents age 55 and over found that:

- 58% of respondents expect to be living in the same home ten years later; and
- 81% of respondents indicated that they would *not* prefer to live in seniors-only housing, even if/when they move from their current residence.⁸

B. Common Challenges for Seniors Aging in Place

Seniors who choose to age in place face many common challenges, such as decreased mobility, difficulty in caring for themselves and their homes, and difficulty staying involved in their communities. Many organizations have highlighted these challenges and advocate that communities develop policies, programs, and services to meet these challenges in order “to promote the quality of life and the ability of older adults to live independently and contribute to their communities for as long as possible.”⁹

This section describes several of these challenges.¹⁰

⁵ *Older Americans 2008: Key Indicators of Well-Being*, Federal Interagency Forum on Aging-Related Statistics at p. 58, 60 (March 2008). One factor in the decreasing demand for nursing home care has been a corresponding increase in demand for care in assisted living facilities. See Ness, J., et al., “Demographics and Payment Characteristics of Nursing Home Residents in the United States: A 23-Year Trend,” *The Journals of Gerontology Series A: Biological Sciences and Medical Sciences* 59, at p. 1213-1217 (2004).

⁶ *A Profile of Older Americans: 2008*, Administration on Aging, U.S. Department of Health and Human Services (2009).

⁷ *Beyond 50.05 Survey* at p. 85-97.

⁸ *55+ Housing Preference Survey*, Montgomery County Department of Park & Planning at p. 1, 3 (2005).

⁹ See *The Maturing of America* at p. 1.

¹⁰ This section draws from: *A Blueprint for Action; The Maturing of America*; Ormond, B. et al. (The Urban Institute), *Supportive Services Programs in Naturally Occurring Retirement Communities*, for the U.S. Department of Health and Human Services at p. 13-15 (2004).

Personal Care. Aging seniors often experience decreased mobility that can result in a need for assistance with personal care. Personal care includes self-care activities of daily living, such as dressing, bathing, grooming, and feeding oneself; and activities that help people maintain their own health and living environment, such as grocery shopping, cooking, housekeeping, doing laundry, and managing medications.

Transportation. Many seniors no longer drive a car, either by choice or because they are no longer able to. As a result, seniors often depend on family, friends, or public transportation for running errands, going to doctor appointments, and attending religious or social events. Seniors who use a wheelchair or have limited mobility may have specialized transportation needs.

Health Care. Seniors often have significant health care needs including nutrition, preventive care, and treatment for chronic conditions. Depending on their personal circumstances, seniors may struggle with access to health care due to transportation or financial limitations. Some seniors also struggle with finding opportunities to stay physically active.

Home Repair and Maintenance. Home repair and maintenance can become difficult for seniors. Seniors may struggle with performing large tasks (e.g., plumbing repairs) or small tasks (e.g., changing a light bulb), or with finding affordable and trustworthy repair companies.

Safety. Aging-in-place seniors face a variety of safety issues in their homes. These issues can range from difficulty hearing smoke detector alarms because of hearing loss, to difficulty quickly exiting a home because of decreased mobility, to falls or other health needs. Seniors may also feel more vulnerable to crime.

Community Involvement. Seniors who age in place may struggle to stay involved in their communities because of issues such as changing health needs, decreasing mobility, and limited transportation. Much as younger members of the population benefit from the mental and physical stimulation associated with continued education, volunteering, and social interaction, seniors also benefit from the same types of activities. Studies show that seniors with strong social networks have a decrease risk for dementia and are able to “remain in community settings longer than older adults who are socially isolated.”¹¹

Appropriate Housing. Accessibility and affordability influence seniors’ ability to age in their current homes. Many seniors’ homes do not have accessible features, such as wider doorways to accommodate wheelchairs; grab bars in bathrooms; and access to living, sleeping, bathing, and eating areas on a single floor. Some seniors need help to retrofit homes so that they can continue to live in them safely.

Affordable housing is also an issue for many seniors, especially those on fixed incomes who may have difficulty keeping up with mortgage payments, rising property taxes, the costs associated with maintaining a home, or increasing rent.

¹¹ See Crooks, V.C., et al., “Social Network, Cognitive Function, and Dementia Incidence Among Elderly Women,” *American Journal of Public Health* 98(7), at p. 1221-1227 (2008); Ashida, S., Heaney, C.A., “Differential Associations of Social Support and Social Connectedness with Structural Features of Social Networks and the Health Status of Older Adults,” *Journal of Aging and Health* 20(7), at p. 872-893 (2008).

CHAPTER III. Two Models for Delivering Services to Seniors Aging in Place

In recent years, numerous communities and organizations have developed two different program models for delivering services to groups of seniors who are aging in place: “naturally occurring retirement community” (NORC) supportive services programs and neighborhood “villages.” This chapter explains the concept of a NORC and describes these two program models:

- **Section A** defines and describes naturally occurring retirement communities (NORC);
- **Section B** describes NORC supportive services programs; and
- **Section C** describes neighborhood “villages.”

A. Naturally Occurring Retirement Communities

In contrast to a retirement community designed exclusively for seniors, a “naturally occurring retirement community” (known as a NORC) is a community that naturally evolves over time to include a relatively large concentration of senior residents. A NORC can develop in a neighborhood, in an apartment or condominium building, or even in a rural community. The concept of a NORC was first described – and the term “NORC” first coined – in academic literature in 1985 by Michael Hunt, currently a professor at the University of Wisconsin’s School of Human Ecology.¹

Unlike planned retirement communities, NORCs develop naturally either when seniors age in place or when seniors move into a non-age-restricted community. A NORC may form when seniors remain in a community when younger people move out, or when seniors age in place and slowly become a higher proportion of the population in a community.² Alternatively, a NORC may form when seniors move into a community that has certain attractive or convenient amenities, such as proximity to shopping or public transportation.

The defining characteristics of a NORC in academic research and literature and in Federal law vary widely, but generally include:

- A geographic designation;
- A minimum concentration of seniors; and
- A minimum age for identifying seniors.

Most of the academic literature defines a NORC as a community where at least 40 to 65 percent of the population are seniors. The minimum age for identifying seniors generally ranges from 50 to 65 years old.³ Table 3-1 on the following page illustrates three varying definitions for a NORC.

¹ See Hunt, M. E., & Gunter-Hunt, G.; “Naturally Occurring Retirement Communities,” *Journal of Housing for the Elderly*, vol. 3, issue 3/4, at p. 3-22 (1985).

² Barbara Ormond et al. (of The Urban Institute), *Supportive Services Programs in Naturally Occurring Retirement Communities*, for the Office of Disability, Aging and Long-Term Care Policy, U.S. Department of Health and Human Services at p. 9 (November 2004) [hereinafter “Ormond, *SSPs in NORCS*”].

³ Ormond, *SSPs in NORCS* at p. 8.

Table 3-1. Definitions of a NORC

Geographic Designation	Minimum Concentration	Minimum Age
Federal Older Americans Act (1965)⁴		
A residential building, housing complex, single family residence, or neighborhood, but not an institutional care or assisted living setting	40% of heads of households (or a critical mass that allow efficiencies in the provision of services to seniors living in the community)	Age 60
Academic Literature – Michael E. Hunt (1985)⁵		
A neighborhood or housing development	50% of residents	Age 50
Academic Literature – S. Lanspery and J. Callahan (1994)⁶		
A neighborhood block group (census term)	40% of heads of households	Age 65

B. NORC Supportive Services Program Model

A NORC supportive services program (NORC-SSP) is a program model for delivering services to seniors who live in naturally occurring retirement communities. First developed in the mid-1980s, NORC-SSPs provide services to seniors based on where a senior lives (i.e., in a NORC), rather than on their level of income or other eligibility requirements.

NORC-SSPs seek to bring various entities together – such as social service providers, health care providers, transportation providers, housing corporations, and residents – to provide services and programs that address both the needs and preferences of residents in a NORC. NORC residents, however, often hold differing opinions about the types of services they most need and/or want, which can complicate the development and implementation of an effective program.⁷

Examples of the types of services provided by NORC-SSPs are:

- Social work case management;
- Home care (emergency or general);
- Transportation;
- Meals;
- Social and cultural events;
- Health care management and prevention activities (i.e., blood pressure screenings);
- Mental health services;
- Bereavement support; and
- Exercise classes.⁸

⁴ 42 U.S.C. § 3032k(a)(2); 42 U.S.C. § 3002(40).

⁵ Vladeck, F., *A Good Place to Grow Old: New York's Model for NORC Supportive Service Programs*, United Hospital Fund at p. 2 (2004). [Hereinafter "Vladeck, New York's Model for NORC-SSPs"]

⁶ Ibid.

⁷ Ormond, *SSPs in NORCS* at p. 15.

⁸ Ibid. at p. 16.

Not all NORC-SSPs provide all these services, and programs often survey residents to identify the types of services needed or wanted in a specific NORC. Some service providers find that events such as health care screenings provide outreach opportunities to provide additional services – such as a social worker to discuss health-related problems – to NORC residents who might not otherwise seek additional services.⁹

Different types of organizations organize and coordinate NORC-SSPs, e.g., local governments, community service agencies, building management.¹⁰ One federal government study found in four out of five case studies, the impetus for a NORC-SSP came from the provider serving the NORC, not the residents themselves.¹¹ Examples of specific challenges that arise when NORC-SSPs are driven by outside entities rather than residents include: “securing the cooperation of building managers in program development and service delivery, gaining resident participation and support, and communicating with residents and getting to know their needs.”¹²

1. Sources of Funding for NORC-SSPs

The primary sources of funding for NORC-SSPs are:

- Private sector cash or in-kind contributions (e.g., meeting space or janitorial services);
- Charitable donations;
- Membership or activity fees from residents; and
- Federal, state, and local government grant funding.

A 2004 U.S. Department of Health and Human Services report on NORC-SSPs highlights that among experts, “sustainable funding to support NORC services programs over the long term is a major concern.”¹³ Between FY02 and FY05, the U.S. Department of Health and Human Services’ Administration on Aging (AOA) provided a combined \$21.4 million in grant funding, which assisted in financing NORC-SSPs located across 25 states.¹⁴ However, AOA awards ended in FY05. NORC-SSPs that lack a sustainable stream of funding have either had to reduce service levels or stop operating altogether.¹⁵

⁹ Ormond, *SSPs in NORCS* at p. 16.

¹⁰ *Ibid.* at p. 12.

¹¹ *Ibid.* at p. 29.

¹² *Ibid.* at p. v.

¹³ *Ibid.* at p. 20. See also Buntin, J., “Seniors and the City,” *Governing* at p. 34-38 (June 2009) (“Despite their rapid spread in recent years, NORCs as a program struggle with the fundamental question of sustainability.”) (included at appendix ©1).

¹⁴ Colello, Kirsten J., *Supportive Service Programs to Naturally Occurring Retirement Communities*, Congressional Research Service at p. 4. (December 2007) [hereinafter “Colello, *SSPs to NORCs*”].

¹⁵ See *Ibid.* at p. 11-12.

2. Challenges Faced by NORC-SSPs

The AOA's 2004 report identified several challenges that NORC-SSPs face, described below.

Program delivery in less densely settled communities. Some communities may be better able to support NORC-SSPs than others. In theory, NORC-SSPs allow service providers to take advantage of economies of scale within the community in order to efficiently target services for seniors. Programs in less densely populated communities encounter more difficulty in providing services than those in more densely populated urban communities and apartment complexes.

Responsiveness to the community. In order to serve the needs of a NORC community, NORC-SSPs must remain responsive to the changing needs of residents. Ongoing communication among service providers and residents allows program staff to assess residents' needs, and help residents learn about available services.

Limitations in services. A NORC-SSP is only one component of a broader approach to meeting the needs of an aging population. The 2004 AOA report cautions that communities should not expect NORC-SSPs to take on the full burden of meeting the changing needs of aging residents, some of which can be better addressed by state and local governments, e.g., street signs and paved sidewalks to facilitate pedestrian travel.

3. New York NORC-SSPs

The State of New York is an example of a jurisdiction that has provided considerable support to NORC-SSPs. In 1986, the first NORC-SSP began operating in New York City in a moderate-income housing cooperative. In 1992, the State of New York began funding NORC-SSPs through public-private partnerships, and New York City began funding NORC-SSPs in 1999. By 2003, 27 NORC-SSP programs existed in the State of New York, with all but two of them located in New York City.¹⁶

These NORC-SSPs are located primarily in public housing, moderate income cooperatives, and low and moderate income rental property. See appendix ©5 for additional details about these NORC-SSPs, including staffing, budgets, and special service features.

¹⁶ Vladek, *New York's Model for NORC-SSPs* at p. 2-6. New York state law establishes funding and evaluation criteria for NORC-SSPs in housing complexes and neighborhoods that qualify as NORCs. See N.Y. Elder Law § 209 (2008).

C. Neighborhood “Villages”

On a grassroots basis, some communities or neighborhoods are developing their own organizations to provide services to seniors who are aging in place in the community; these are commonly referred to as neighborhood “villages.” A community in Boston, Massachusetts organized the first village – known as Beacon Hill Village – in 2001. In recent years, other communities have adapted the Beacon Hill Village model to organize villages that meet their communities’ needs.¹⁷ The communities that form villages are not necessarily NORCs because they may lack the high concentration of seniors found, by definition, in a NORC.

The village model for providing services to seniors is very adaptable. The villages described in this chapter and in Chapter V vary in how they provide services to their members. In particular, their organizational structure, fee schedule, and types of services tend to vary, based on the needs and wants of their respective neighborhoods.

Villages commonly define their potential membership based on geographic boundaries (e.g., people who live in a specific neighborhood). Some villages provide services and/or programs only for members who “join” the village and pay membership dues while other villages use volunteers to provide services and programs, without charging membership dues. Additionally, some villages set a minimum age limit for membership.

1. Typical Village Services

Neighborhood villages’ services vary significantly. Common services provided by villages are:

- Transportation;
- Assistance with household repairs and maintenance;
- Information and referrals for services, such as home maintenance and personal care;
- Friendly visits or phone calls; and
- Social and educational programs and events.

Villages commonly rely heavily on volunteers of all ages to help provide services, and villages that offer information and referral services typically screen service providers for village members.

2. Challenges Faced by Villages

Village leaders in Beacon Hill and other villages report several challenges, described below.

Sustainable funding. All villages face the question of how to raise money to support their work. Some villages charge membership fees to help cover a portion of their costs. Others provide services at no charge to residents who live within the village boundaries and seek funding from other sources. Many villages incorporate as not-for-profit organizations and

¹⁷ Cohen, A. & Willett, J., *Intentional Communities for Aging in Place: Consumers Taking the Lead*, <http://www.house-works.com/docs/Aging%20Today%20Article.pdf>.

receive federal tax exempt status (501(c)(3) status) from the Internal Revenue Service (IRS), which then allows individuals to deduct contributions to these villages from their federal taxes. For example, Beacon Hill Village's membership fees cover only an estimated 50 percent of the organization's costs and the organization has struggled financially in the past.¹⁸

Funding can also challenge a village that seeks to include seniors of all income levels. Villages that provide subsidized memberships for lower-income seniors need additional funds to cover the cost of the subsidies.

Resident participation. Some villages have willing volunteers that far outnumber requests for services. Because the formation of neighborhood villages is a relatively recent phenomenon, seniors who are aging in place often have established arrangements for needed services, either from family members, friends, or other services providers. Some villages have found that many seniors do not feel that they are ready for the type of support services offered by the villages.¹⁹ Additionally, some programs report barriers due to seniors who are hesitant to ask for help from volunteers.

Volunteer liability. Villages that provide services to seniors through volunteers must consider volunteer liability for accidents or injuries sustained while providing services. The extent of liability depends on local laws. Some villages purchase liability insurance to protect themselves and their volunteers.

Outcome measurement. The village model is relatively new, and there is no formal research on whether the services the villages provide help seniors to stay in their homes longer. Most established villages have only anecdotal evidence of the benefits of their services.²⁰

Government support. Overall, government has not played a large role in the development or support of villages. Beacon Hill and Capitol Hill Village (in Washington D.C.) have not received funding or technical support from local or other government sources. The County Government's role in supporting County villages is described in more detail in Chapter VI.

3. Description of Two Villages

Table 3-2 (next page) summarizes the organizational structure of Beacon Hill Village in Boston and Capitol Hill Village in Washington D.C. A list of other villages around the country and contact information is found in the appendix at ©9.

¹⁸ Beacon Hill Village 2007 Conference notes from Montgomery County DHHS Aging and Disability Services' staff.

¹⁹ Interviews with staff or volunteers from Beacon Hill Village, Capitol Hill Village, and Burning Tree Village.

²⁰ Ibid.

Table 3-2. Summary of Information about Beacon Hill Village and Capitol Hill Village

	Beacon Hill Village ²¹	Capitol Hill Village ²²
Founded	2001	October 2007
Tax-Exempt Status	Yes	Yes
Paid Staff	Executive Director 6 part-time staff	Executive Director
Number of Volunteers	50	150
Annual Budget	\$470,000	\$127,000
Primary Funding Sources	Membership Fees: Individual - \$600/year Household - \$850/year Fundraising: Approximately 50% of total revenue	Membership Fees: Individual - \$530/year Household - \$800/year
Subsidized Memberships for Low Income Individuals	\$100/year; includes a \$250 credit for services with additional fees. Available for residents with less than \$45,000 in annual income who are at least 60 years old.	Individual - \$100/year; includes a \$250 credit for services with additional fees. Household - \$200/year; includes a \$350 credit for services with additional fees.
# of Members (# of eligible members)	470 (approximately 3000)	180
Minimum Age for Membership	50	None
Neighborhood Demographic	18% over 50 years old	Unknown
Types of Services Provided	<ul style="list-style-type: none"> • Transportation (most requested); • Discounted home healthcare services; • Fitness programs; • Assistance with household tasks (e.g., repairs, cleaning, cooking, bill-paying, computers); • Referrals for services not provided by the village; and • Social and cultural activities. 	<ul style="list-style-type: none"> • Transportation (most requested); • Home maintenance and gardening; • Daily check-in phone call; • In-home care assistance (meals, household tasks); • Assistance with electronics; • Medical advocacy; • Social events; and • Referrals for professional services.
Referrals to Outside Service Vendor	Yes. Village researches, interviews, and checks references, and does a background check for outside vendors.	Yes. Village uses Washington Consumer Checkbook to refer members to outside vendors.

Source: Interviews with staff from Beacon Hill Village and Capitol Hill Village; Notes from conference attended by Montgomery County Department of Health and Human Services staff

²¹ Interview with Rita Kostiuk, Beacon Hill Village, January 14, 2009

²² Interview with Ann Grace, Capitol Hill Village, January 15, 2009

CHAPTER IV. Demographic Data on Seniors in Montgomery County

This chapter describes demographic data on seniors in Montgomery County and is organized as follows:

- **Part A, Census Data**, summarizes 2000 and 2005 demographic data on seniors in the County; and
- **Part B, Forecast Data**, summarizes the published projections of the senior population in the County over the next 25 years.

A. Census Data on County Seniors

This section summarizes demographic information about seniors (persons age 65 and over) in the County based on:

- Data from the 2000 U.S. Census, compiled by the U.S. Census Bureau; and
- Data from the 2005 Census Update Survey, compiled by the Research & Technology Center of the Montgomery County Planning Department.

The most recent demographic data for the County – the 2005 Census Update Survey data compiled by the Planning Department – are available only by the County’s planning areas, and not by the smaller geographic designations used in the Census conducted every ten years by the U.S. Census Bureau – e.g., census tracts, block groups.

The broad geographic scope of the planning areas allows for general demographic comparisons among the different areas of the County. However, planning area data do not allow for the identification of NORCs because NORCs are typically limited to more narrow geographic areas – e.g., neighborhoods or apartment buildings.

Both the 2005 Census Update Survey data and the forecast data in Part B of this chapter track the population “living in households.” The population living in households excludes the population in “group quarters,” which the U.S. Census Bureau defines as “a place where people live or stay that is normally owned or managed by an entity or organization providing housing and/or services for the residents.... People living in group quarters are usually not related to each other.”¹ Examples of group quarters are correctional facilities, college dormitories, military barracks, and group homes. In other words, the data in this chapter include seniors living in houses or apartments, including age-restricted developments such as Leisure World, but excludes seniors living in group homes or nursing homes.

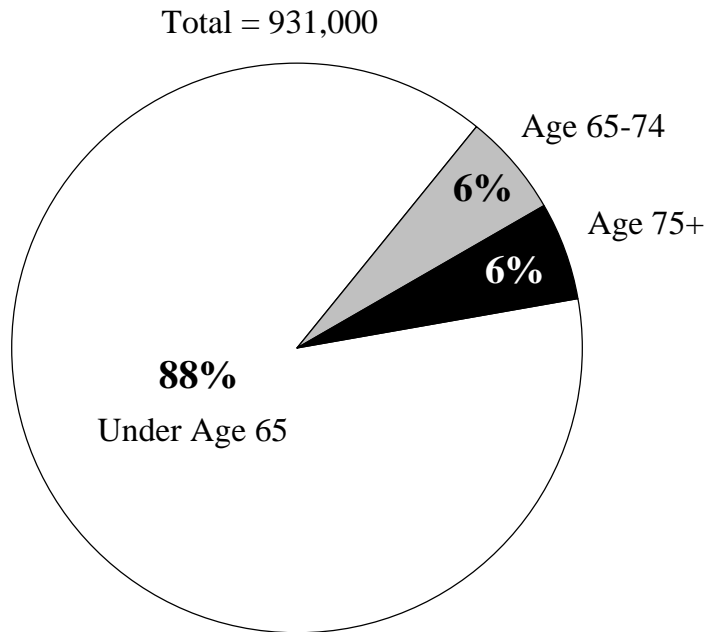
Population Overview– 2000 and 2005. In 2000, Montgomery County had a total population of 873,341 people. Individuals under age 65 made up 89% of the total population; seniors age 65 to 74 comprised 6% of the population; and seniors age 75 and over comprised about 5% of the population.²

¹ U.S. Census Bureau Glossary. www.census.gov.

² *Montgomery County, Maryland: Profile of General Demographic Characteristics*, U. S. Census Bureau (2000).

By 2005, Montgomery County's population had increased to 931,000 with approximately 88% of the County's population under age 65. Compared to 2000, seniors age 65 to 74 had increased in number but remained at about the same percentage (6%) of the County population; while seniors age 75 and over had increased both in number and as a percentage of all residents (6%).³ Exhibit 4-1 shows the age composition of the County population in 2005.

Exhibit 4-1. Age Composition of the County Population, 2005



Source: 2005 Census Update Survey, Montgomery County Planning Department

Age composition by planning area. The majority of the County's senior population resides in the older communities of the County located along the Capital Beltway (I-495) and the I-270 corridor. There is a further concentration of persons age 75 and over inside the Beltway and along MD-355 from Friendship Heights to Rockville.⁴ These residential areas of the County are near public transit, and typically have greater access to retail and other services.⁵

In 2005, nine of the County's 21 planning areas⁶ had greater proportions of seniors than the County as a whole. Table 4-1 shows the County's age composition by planning area in 2005, listed in order of highest to lowest percentage of residents age 65 and over. The three planning areas with the highest proportion of seniors were:

³ 2005 Census Update Survey, Montgomery County Planning Department, Research & Technology Center, M-NCPPC (February 2009).

⁴ Suarez, S., Kearne, B., and Roman, S., *Affordable Assisted Living Tops Senior Housing Needs!*, Montgomery County Planning Department, Research & Technology Center, M-NCPPC at p. 2 (September 2006). http://www.montgomeryplanning.org/research/documents/senior_housing_report_2006.pdf

⁵ Suarez, S., *55+ Housing Preference Survey*, Montgomery County Planning Department, Research & Technology Center, M-NCPPC at p. 4 (March 2005).

http://www.montgomeryplanning.org/research/data_library/housing/studies/housing_55_final_version.pdf

⁶ The County has 28 total planning areas. For the 2005 Census Update Survey, the County Planning Department combined several planning areas together under the name of one planning area and refers to these as "[planning area] and vicinity." Consequently, the tables and charts in this chapter list 21 planning areas or combinations thereof. For a map of these 21 planning areas, see appendix ©10.

- Aspen Hill, with a senior population of 20%;⁷
- Bethesda/Chevy Chase, with a senior population of 18%; and
- North Bethesda, with a senior population of 17%.

Table 4-1. Age Composition of County Population by Planning Area, 2005

Planning Area	Population	Percent of Total Population			
		Under Age 65	Age 65+	Age 65-74	Age 75+
Aspen Hill	62,867	80	20	9	12
Bethesda/Chevy Chase	92,600	82	18	8	11
North Bethesda	41,848	83	17	7	10
Potomac/Cabin John	48,429	85	15	9	5
Kensington/Wheaton	78,065	87	13	7	6
Kemp Mill/Four Corners	35,606	87	13	5	7
Cloverly	19,813	87	13	7	6
Rockville	53,706	88	12	7	6
Colesville/White Oak	35,214	88	12	5	7
MONTGOMERY COUNTY	931,000	88	12	6	6
Silver Spring	35,865	90	10	4	6
Poolesville*	9,219	90	10	5	5
Takoma Park	29,667	90	10	4	6
Gaithersburg*	130,499	92	8	4	4
Damascus*	33,121	92	8	5	3
Travilah	30,333	93	7	4	4
Fairland	41,470	93	7	5	2
Upper Rock Creek	14,224	94	6	4	2
Olney	38,613	94	6	3	2
Darnestown	13,762	94	6	3	2
Clarksburg	6,499	94	6	3	2
Germantown	79,579	96	4	3	2

Source: 2005 Census Update Survey, Montgomery County Planning Department

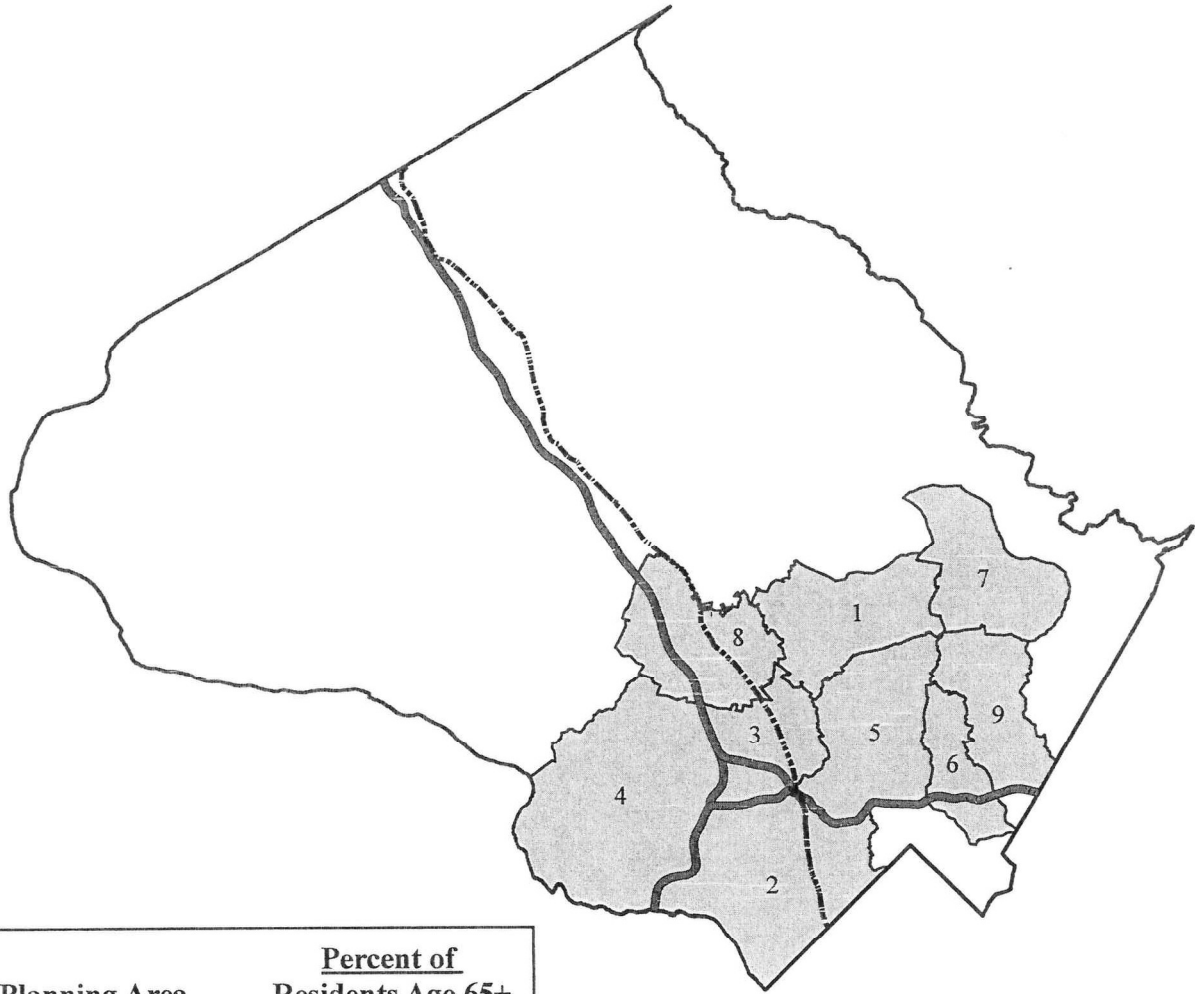
Note: Percents may not sum to totals due to rounding

*Planning area *and vicinity*, as defined by the Montgomery County Planning Department

Exhibit 4-2 on the following page shows the location of the nine planning areas with a greater proportion of persons age 65 and over than the County as a whole (12%).

⁷ Leisure World, a private, age-restricted community for seniors, is located in Aspen Hill.

Exhibit 4-2. County Planning Areas with Highest Concentrations of Senior Residents, 2005

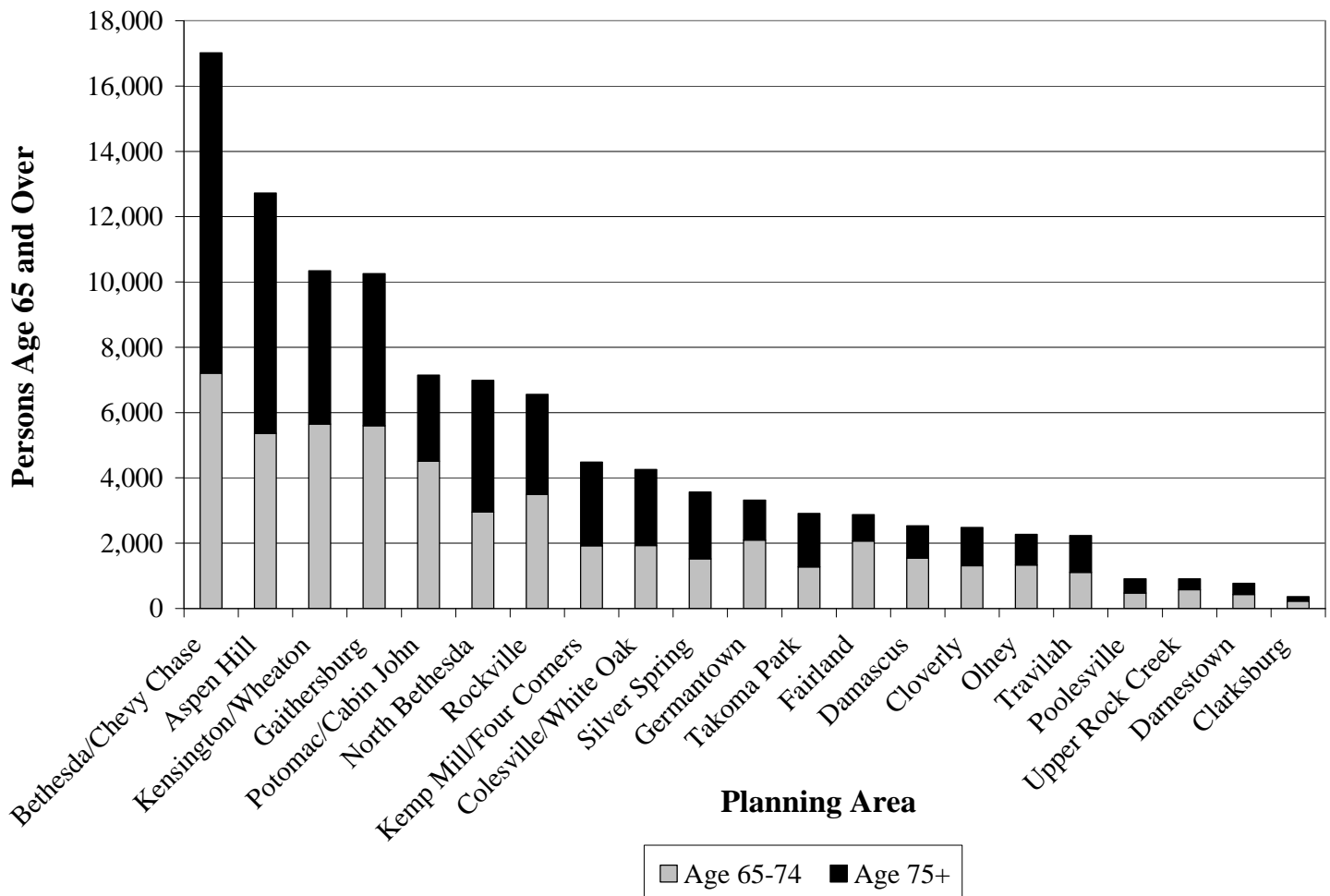


<u>Planning Area</u>	<u>Percent of Residents Age 65+</u>
1 - Aspen Hill	20%
2 - Bethesda/Chevy Chase	18%
3 - North Bethesda	17%
4 - Potomac/Cabin John	15%
5 - Kensington/Wheaton	13%
6 - Kemp Mill/Four Corners	13%
7 - Cloverly	13%
8 - Rockville	12%
9 - Colesville/White Oak	12%
Montgomery County	11%

Source: 2005 Census Update Survey, Montgomery County Planning Department

Exhibit 4-3 (below) shows the number of seniors (persons age 65 and over) by County planning area in 2005. The four planning areas with the largest number of seniors were Bethesda/Chevy Chase, Aspen Hill, Kensington/Wheaton, and Gaithersburg; each with over 10,000 seniors living in the planning area. The areas with the highest number of persons age 75 and older were Bethesda/Chevy Chase (9,810) and Aspen Hill (7,363). About half of the planning areas shown have fewer than 3,000 senior residents, and four have fewer than 1,000 seniors.

Exhibit 4-3. Number of Seniors in Each County Planning Area, 2005



Source: 2005 Census Update Survey, Montgomery County Planning Department

Due to differences in the total number of residents in each planning area, the County planning areas with the highest proportion of seniors did not necessarily have the highest numbers of seniors. Table 4-2 on the following page compares each planning area's proportion of seniors to its total number of seniors, in order from highest to lowest proportion.

Table 4-2. Ranked Proportion and Number of Seniors by County Planning Area, 2005

Planning Area	Percent of Population Age 65+	Rank	Numbers of Residents Age 65+	Rank
Aspen Hill	20	1	12,724	2
Bethesda/Chevy Chase	18	2	17,018	1
North Bethesda	17	3	6,987	6
Potomac/Cabin John	15	4	7,146	5
Kensington/Wheaton	13	5	10,343	3
Kemp Mill/Four Corners	13	6	4,483	8
Cloverly	13	7	2,482	15
Rockville	12	8	6,556	7
Colesville/White Oak	12	9	4,257	9
Silver Spring	10	10	3,568	10
Poolesville*	10	11	908	18
Takoma Park	10	12	2,914	12
Gaithersburg*	8	13	10,252	4
Damascus*	8	14	2,530	14
Travilah	7	15	2,236	17
Fairland	7	16	2,879	13
Upper Rock Creek	6	17	907	19
Olney	6	18	2,271	16
Darnestown	6	19	771	20
Clarksburg	6	20	362	21
Germantown	4	21	3,321	11

Source: 2005 Census Update Survey, Montgomery County Planning Department

* Planning area *and vicinity*, as defined by the Montgomery County Planning Department

Countywide race/ethnicity composition. The table below compares the race/ethnicity of the County's seniors to the population as a whole. The data show that, in 2005, a notably higher percentage of County seniors were non-Hispanic white when compared to the overall County population. Specifically, 56% of the overall County population was non-Hispanic white, compared to 71% of residents age 65-74 and 77% of residents age 75 and over.

Table 4-3. Race/Ethnicity Composition of Senior vs. Total Population in County, 2005

Age Group	Percent White (non-Hispanic)	Percent Black	Percent Asian	Percent Hispanic
MONTGOMERY COUNTY	56	17	13	14
Age 65-74	65	14	14	7
Age 75+	77	8	8	7

Source: 2005 Census Update Survey, Montgomery County Planning Department

Note: Percents may not sum to the total due to rounding

Race/ethnicity composition by planning area. Table 4-4 below shows the race/ethnicity composition of the County's senior population by County planning area in order of highest to lowest percentage of seniors (persons age 65 and over). Non-Hispanic white residents were the majority of seniors in 18 of the 21 planning areas.

The three planning areas where a majority of the senior population was non-white are Takoma Park (59%), Germantown (57%), and Silver Spring (54%). The three planning areas with the highest composition of non-Hispanic white seniors were Bethesda/Chevy Chase (88%), Upper Rock Creek (84%), and North Bethesda (83%).

Table 4-4. Race/Ethnicity of Persons Age 65 and Over by County Planning Area, 2005

Planning Area	Population Age 65+					
	Total #	% White (non-Hispanic)	% Black	% Asian	% Hispanic	% Other
MONTGOMERY COUNTY	104,804	71	11	11	7	1
Aspen Hill	12,724	75	11	8	5	1
Bethesda/Chevy Chase	17,018	88	4	5	3	0
North Bethesda	6,987	83	2	10	5	0
Potomac/Cabin John	7,146	79	1	14	6	0
Kensington/Wheaton	10,343	62	13	11	13	1
Kemp Mill/Four Corners	4,483	60	19	12	9	0
Cloverly	2,482	61	16	13	10	0
Rockville	6,556	73	7	13	7	1
Colesville/White Oak	4,257	65	23	6	5	1
Silver Spring	3,568	46	40	5	8	2
Poolesville*	908	73	15	6	4	2
Takoma Park	2,914	42	35	11	13	1
Gaithersburg*	10,252	67	9	13	11	1
Damascus*	2,530	80	12	3	3	1
Travilah	2,236	66	2	28	4	0
Fairland	2,879	53	22	17	6	1
Upper Rock Creek	907	84	9	8	0	0
Olney	2,271	75	11	4	9	1
Darnestown	771	77	6	17	0	1
Clarksburg	362	63	3	16	18	1
Germantown	3,321	44	13	31	12	1

Source: 2005 Census Update Survey, Montgomery County Planning Department

Note: Numbers may not sum to the total due to rounding

* Planning area *and vicinity*, as defined by the Montgomery County Planning Department

Household income by planning area. Table 4-5 below shows the median household income of the senior population by County planning area in order of highest to lowest median household income (persons age 65 and over).

The three planning areas with the highest annual median income were Darnestown (\$109,600), Potomac/Cabin John (\$103,400), and Bethesda/Chevy Chase (\$91,400). The three planning areas with the lowest annual median income were Takoma Park (\$23,800), Fairland (\$42,800), and Silver Spring (\$44,100).

Table 4-5. Annual Median Household Income of Persons Age 65 and Over by County Planning Area, 2004

Planning Area	Annual Median Household Income (\$) +	Rank of Planning Area in Proportion of Seniors
Darnestown	109,600	19
Potomac/Cabin John	103,400	4
Bethesda/Chevy Chase	91,400	2
Upper Rock Creek	88,500	17
Colesville/White Oak	68,500	9
Cloverly	68,400	7
Travilah	64,600	15
Clarksburg	64,400	20
Poolesville*	63,300	11
MONTGOMERY COUNTY	\$60,000	--
North Bethesda	57,900	3
Olney	56,500	18
Kensington/Wheaton	55,300	5
Kemp Mill/Four Corners	53,100	6
Damascus*	51,500	14
Gaithersburg*	50,500	13
Rockville	48,900	8
Germantown	48,400	21
Aspen Hill	47,500	1
Silver Spring	44,100	10
Fairland	42,800	16
Takoma Park	23,800	12

Source: 2005 Census Update Survey, Montgomery County Planning Department

* Planning area *and vicinity*, as defined by the Montgomery County Planning Department

+Rounded to nearest \$100

A. Forecast Data about Seniors in the County

This section summarizes Montgomery County Planning Department projections of the number of seniors (persons age 65 and over) in Montgomery County over the 25 year period between 2005 and 2030. The Montgomery County Planning Department developed this forecast data from the 2005 Census Update Survey; like the previous section, the data reflect only the population living in households, excluding the population in group quarters (e.g., correctional facilities and nursing homes).¹ The Planning Department most recently updated these data in 2007.²

1. Countywide Forecast

Over the next 25 years, the number of seniors in the United States is projected to increase at a faster rate than non-seniors, as the members of the baby boom generation age. According to the federal Administration on Aging, the number of individuals age 65 and over, as a percentage of the total U.S. population, is projected to increase from 12% in 2005 to 19% in 2030.³

Montgomery County's population trend is similar. The population of seniors age 65 and over in the County is projected to increase from 105,000 in 2005 to 189,000 in 2030. This translates into an increase from 12% to 17% of the total County population. In other words – in 2005, there were eight non-seniors for every senior (a ratio of 8:1); in 2030, there will be only five non-seniors for every senior (a ratio of 5:1). Exhibit 4-4 on the following page illustrates the growth of the Montgomery County senior population as a percentage of the total population living in households.

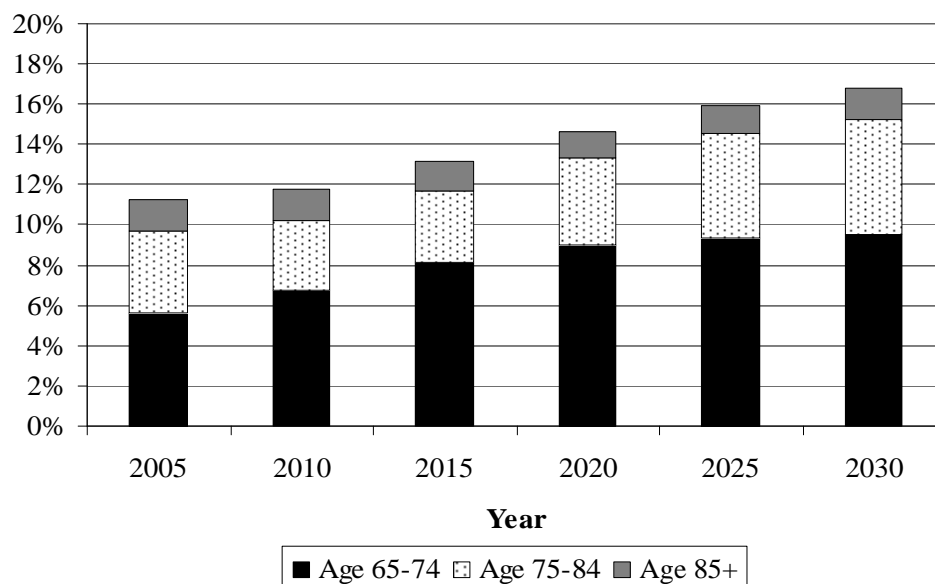
According to the Planning Department's projections, the fastest growing senior age group in the County is the cohort of seniors age 65 to 74, which is expected to increase from 6% of the total population in households in 2005 to 10% in 2030. The group of seniors age 75-84 is also expected to become a larger percentage of the population, while the age bracket of seniors age 85 and over is projected to remain stable in proportion to the rest of the population in households.

¹ The 2005 data in this section is estimated for January 2005, while the 2005 data in the previous section was for July 2005, so there may be slight differences in the datasets.

² *Round 7.1 Population Forecast, Age of Population Living in Households, Montgomery County, MD.*, Montgomery County Planning Department, M-NCPPC (2007) [hereinafter "*Round 7.1 Population Forecast*"].

³ *A Profile of Older Americans: 2006*, Administration on Aging, U.S. Department of Health and Human Services (2006). http://www.aoa.gov/AoAroot/Aging_Statistics/Profile/2006/2006profile.pdf

Exhibit 4-4. Montgomery County Seniors as a Percentage of the Total Population Living in Households, 2005 to 2030



Source: Population Forecast, COG Round 7.1, Montgomery County Planning Department

Table 4-6 (next page) compares the growth rates of the senior and non-senior population from 2005 to 2030. During this time, the population of seniors living in households is projected to increase from 105,000 to 189,000, an increase of 81%. This compares to a projected increase from 823,000 to 937,000 for persons under 65 years of age, an increase of only 14%.⁴ During this time, the total County population living in households (seniors and non-seniors) is expected to increase by 21% (199,000).

The increase in the senior population between 2005 and 2030 is highest among seniors age 65-74, which is projected to more than double. The largest five-year increases in the senior population are expected to occur between 2010 and 2025, with slower rates of growth at the beginning and end of the 25-year period. Researchers expect similar trends in the United States as a whole as baby boomers – born roughly between 1946 and 1965 – begin turning 65 in 2011.⁵

⁴ Round 7.1 Population Forecast.

⁵ *Getting Current: Recent Demographic Trends in Metropolitan America*, The Brookings Institution (2009).

http://www.brookings.edu/~media/Files/rc/reports/2009/03_metro_demographic_trends/03_metro_demographic_trends.pdf

Table 4-6. Forecast of Change in Montgomery County Senior and Non-Senior Populations Living in Households, 2005 to 2030 (# of people in 000s)

Age	2005	2010	2015	2020	2025	2030	Change 2005-2030	
							#	%
0 to 64	823	862	887	905	921	937	114	14%
65+	105	115	135	155	175	189	85	81%
65-74	52	66	83	96	103	107	55	105%
75-84	38	34	37	45	57	65	27	71%
85+	14	15	15	14	15	18	3	21%
Total Population Living in Households	927	978	1,022	1,060	1,096	1,126	199	21%

Source: Population Forecast, COG Round 7.1, Montgomery County Planning Department

Note: Numbers may not sum to the totals due to rounding.

2. Senior Population Forecast by Planning Area

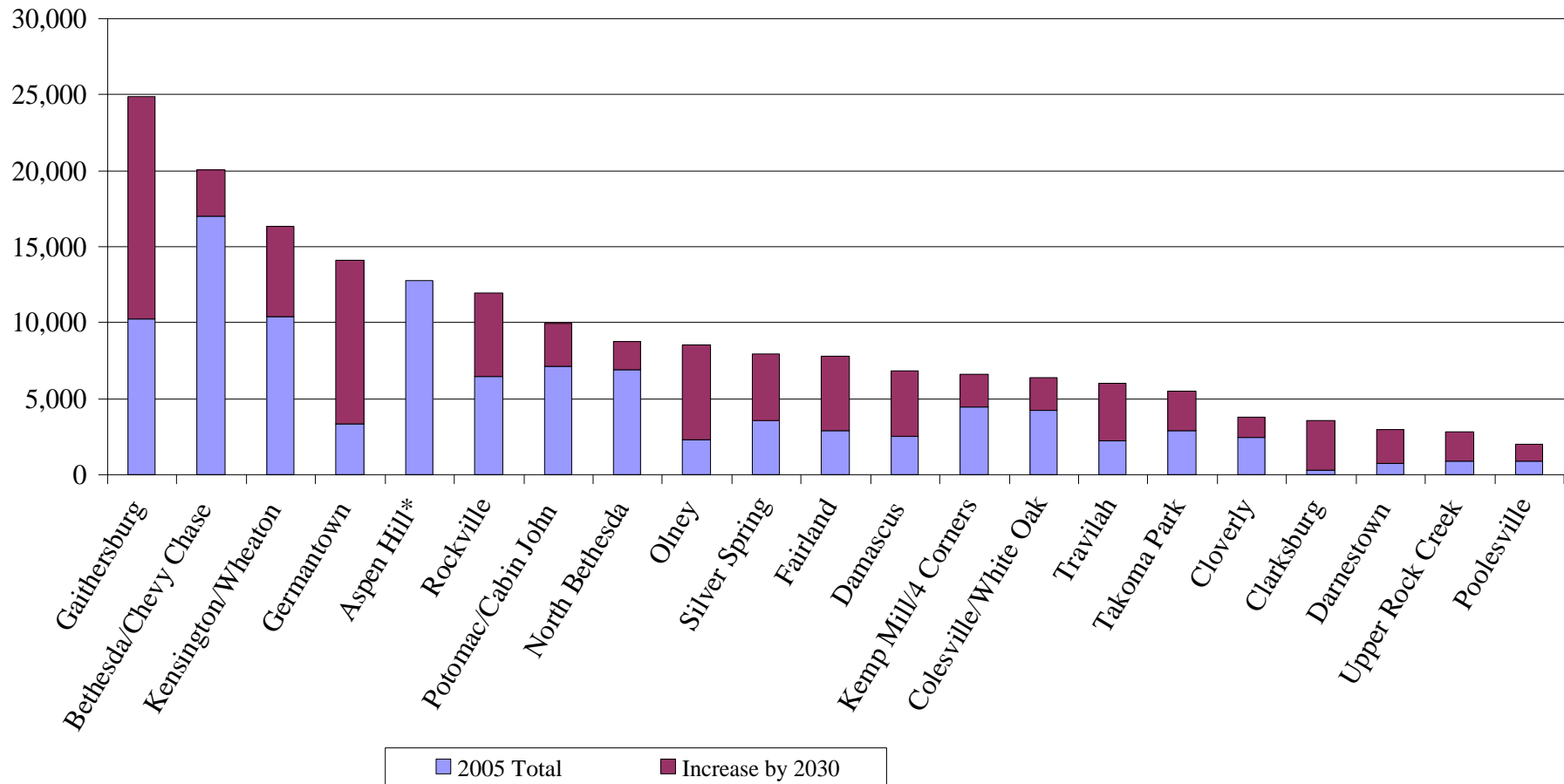
A comparison of the 2005 data to 2030 data projections show that in nearly all County planning areas, the senior population is growing at a faster rate than the non-senior population. As a result, over the next 26 years, almost all County planning areas will have both a larger number and higher percentage of seniors by 2030.

Between 2005 and 2030, 20 out of 21 planning areas in the County are expected to have an increase in the number of seniors. Aspen Hill is the only planning area where the senior population is expected to decrease. In 2005, the planning area with the largest number of seniors was Bethesda/Chevy Chase – which had almost 17,000 seniors – followed by Aspen Hill, Kensington/Wheaton, and Gaithersburg (see Exhibit 4-3 in Section A, page 17).

Exhibit 4-5 (next page) shows that by 2030, Gaithersburg is expected to surpass Bethesda/Chevy Chase as the planning area with the largest number of seniors; followed by Bethesda/Chevy Chase, Kensington/Wheaton, Germantown, and then Aspen Hill. Where four planning areas had more than 10,000 seniors in 2005, six planning areas are expected to have more than 10,000 seniors in 2030.

Gaithersburg is expected to have the largest increase in the number of seniors of any planning area in the County, with an increase of 15,000 seniors (to 25,000) in 2030. However, seniors are still projected to be a relatively low percentage of the 2030 Gaithersburg population compared to other planning areas because of a large corresponding increase in the non-senior population.

Exhibit 4-5. Changes in the Number of Seniors Projected in Each County Planning Area, 2005 to 2030



Source: Population Forecast, COG Round 7.1, Montgomery County Planning Department

*Note: The senior population in the Aspen Hill planning area is projected to decrease by approximately 350 residents by 2030.

Senior population growth rate by planning area. The data show that several planning areas with small senior populations in 2005 are poised for large percentage increases in their senior population. However, many of these planning areas will still have small senior populations when compared to more populated areas of the County.

For example, the senior population is expected to more than double (in some cases triple or more) in 11 of the 21 planning areas; however, 8 of these 11 planning areas had a small number of seniors in 2005 (under 3,000). Table 4-7 summarizes this growth.

Table 4-7. Planning Areas where Senior Population is Projected to Double by 2030

Planning Area	Senior Population Projected Growth Rate, 2005 to 2030	3,000 Seniors or Fewer in Planning Area in 2005
Clarksburg	975%	✓
Germantown	324%	
Darnestown	284%	✓
Olney	276%	✓
Upper Rock Creek	211%	✓
Fairland	172%	✓
Travilah	171%	✓
Damascus	170%	✓
Gaithersburg	143%	
Poolesville	123%	✓
Silver Spring	122%	

Source: Population Forecast, COG Round 7.1, Montgomery County Planning Department

The proportion of seniors in many of the planning areas is projected to increase between 2005 and 2030 because the growth rate of the non-senior population is lower than the growth rate of the senior population. For example, Darnestown is projected to supplant Aspen Hill as the planning area with the largest proportion of seniors in 2030, with seniors making up 23% of Darnestown's total population.

While Clarksburg is projected to have the fastest senior population growth rate between 2005 and 2030, its non-senior population is also projected to grow at a rapid rate (610%). Consequently, in 2030, Clarksburg is projected to have the smallest proportion of seniors compared to non-seniors of any planning area.

Six planning areas (Kemp Mill/Four Corners, Cloverly, Potomac/Cabin John, Colesville/White Oak, Travilah, and Darnestown) are projected to have an overall population decline, despite increases in the senior population. Table 4-8 on the next page summarizes the population growth rate of each planning area between 2005 and 2030.

**Table 4-8. Senior and Non-Senior Population Growth Rates between 2005 and 2030, by Planning Area
(Population in 000s)**

Age	2005	2030	% Change
MONTGOMERY COUNTY			
0-64	823	937	14%
65+	105	189	81%
Total	927	1,126	21%
Clarksburg			
0-64	6	40	610%
65+	0	4	975%
Total	6	43	631%
Germantown			
0-64	76	72	-5%
65+	3	14	324%
Total	80	87	9%
Darnestown			
0-64	13	9	-27%
65+	1	3	284%
Total	14	12	-9%
Olney			
0-64	36	32	-11%
65+	2	9	276%
Total	39	41	6%
Upper Rock Creek			
0-64	13	11	-15%
65+	1	3	211%
Total	14	14	0%
Fairland			
0-64	38	33	-13%
65+	3	8	172%
Total	41	41	0%
Travilah			
0-64	28	21	-26%
65+	2	6	171%
Total	30	27	-12%
Damascus			
0-64	30	29	-5%
65+	3	7	170%
Total	33	36	9%
Gaithersburg			
0-64	120	152	26%
65+	10	25	143%
Total	130	177	35%
Poolesville			
0-64	8	9	6%
65+	1	2	123%
Total	9	11	17%

Age	2005	2030	% Change
Silver Spring			
0-64	32	53	66%
65+	4	8	122%
Total	36	61	72%
Takoma Park			
0-64	27	25	-5%
65+	3	5	88%
Total	30	31	4%
Rockville			
0-64	46	59	27%
65+	6	12	86%
Total	53	71	34%
Kensington/Wheaton			
0-64	68	75	10%
65+	10	16	57%
Total	78	91	17%
Cloverly			
0-64	17	15	-16%
65+	2	4	55%
Total	20	18	-7%
Colesville/White Oak			
0-64	31	28	-8%
65+	4	6	52%
Total	35	35	-1%
Kemp Mill/Four Corners			
0-64	31	28	-9%
65+	4	7	48%
Total	36	35	-2%
Potomac/Cabin John			
0-64	41	38	-8%
65+	7	10	39%
Total	48	48	-1%
North Bethesda			
0-64	34	59	72%
65+	7	9	27%
Total	41	68	65%
Bethesda/Chevy Chase			
0-64	75	99	32%
65+	17	20	18%
Total	92	119	29%
Aspen Hill			
0-64	50	48	-4%
65+	13	12	-3%
Total	63	61	-3%

Source: Population Forecast, COG Round 7.1, Montgomery County Planning Department

CHAPTER V. Naturally Occurring Retirement Community Supportive Services Programs and Neighborhood Villages in the County

Only one organization in Montgomery County – the Jewish Federation of Greater Washington – has developed a NORC-SSP, called “Community Partners,” to help seniors age in place.¹ In more recent years, several Montgomery County neighborhoods have developed or begun to develop “neighborhood villages” to help local seniors age in place.

In this chapter, **Part A** describes the Community Partners program and **Part B** describes the neighborhood village programs in Montgomery County.

A. Community Partners

Community Partners was established in 2003 by the Jewish Federation of Greater Washington through a grant from the U.S. Department of Health and Human Services’ Administration on Aging to develop a program that provides services to seniors age 60 or older living in NORCs. Community Partners began as a collaboration of six non-profit organizations providing services to seniors residing in condominium or apartment buildings identified by Community Partners’ staff as NORCs.

Between 2003 and 2008, Community Partners provided services at various times in nine different apartment or condominium buildings or complexes. Community Partners’ staff identified NORCs by speaking with building managers and with individuals working with seniors in the County. The buildings served by Community Partners were:

Building	Location
Grosvenor Park I	Bethesda
Whitley Park	Bethesda
The Monterey (previously The Pavilion)	North Bethesda
Congressional Towers	Rockville
Fallswood	Rockville
The Forum	Rockville
Old Georgetown Village	Rockville
University Towers	Silver Spring
The Warwick	Silver Spring

In 2008, due to funding constraints, Community Partners changed its program model to a fee-based membership organization open to all County seniors, providing services for its members at different locations in Montgomery County.

Sources of Funding. The Jewish Federation of Greater Washington launched Community Partners with a \$1.2 million federal grant from the U.S. Administration on Aging. As a condition of the federal funding, Montgomery County Government provided Community Partners with \$200,000 in FY04; the non-competitively awarded contract was managed by the County’s Department of Health and Human Services.

¹ Community Partners’ services are not limited to Jewish seniors.

In FY05, Community Partners received a second award of \$992,000 through a federal grant and in FY06, received a second County Government contract award of \$300,000. Montgomery County's Department of Housing and Community Affairs managed the FY06 contract.

Community Partners' federal funding ended in June of 2009. In anticipation of this, in November 2008 Community Partners stopped providing services on-site in NORC buildings it served and became a fee-based membership organization (\$120/year pro-rated monthly), extending its membership to all County seniors.

Community Partners currently has funding from the State of Maryland and private grant funding. Staff are also exploring recently-announced opportunities for federal funding for aging-in-place initiatives.

Services provided. Originally, Community Partners developed its program to provide services directly to seniors living in NORCs in Montgomery County. Table 5-1 summarizes the services provided by Community Partners in NORC buildings from 2003 to 2008.

**Table 5-1. Summary of In-Home or In-Building
Services Provided by Community Partners, 2003-2008**

Organization	Service(s) Provided
Jewish Federation of Greater Washington	<ul style="list-style-type: none"> Administration of Community Partners
Jewish Social Service Agency	<ul style="list-style-type: none"> On-site service Social work groups (education, socialization, health, etc.) Care Management Information and referral Financial subsidy oversight
Jewish Community Center of Greater Washington	<ul style="list-style-type: none"> Exercise classes Parties and social hours Trips to movies, theaters, museums, gardens, and lectures On-site book clubs, game nights, art programs
Premier Home Health	<ul style="list-style-type: none"> 24-hour emergency alert service Homemaker cleaning services Blood pressure clinics Health and wellness seminars Home safety assessments
Jewish Council for the Aging	<ul style="list-style-type: none"> "Smooth Riding" transportation service to medical appointments, shopping, and other destinations Bus transportation for trips Routed transportation
Jewish Information and Referral Service	<ul style="list-style-type: none"> Information and referrals on numerous topics for seniors in the local and broader community. A to Z information booklets

Source: Community Partners' brochure and interviews with Community Partners staff

Community Partners' current programming includes monthly social excursions, a monthly "Day @ the J" (Jewish Community Center of Greater Washington) program, movies, and lunches at local restaurants followed by entertainment, such as group games. Supplemental programming is also provided at several local senior kosher nutrition sites. Community Partners' social workers attend these programs to build relationships with the seniors and provide information and assistance.

In November 2008, Community Partners also established a formal relationship with Leisure World's "Jewish Residents of Leisure World" group, which includes more than half of Leisure World's approximately 2,000 residents. Community Partners has created a series of four programs specifically for Leisure World residents.

B. Neighborhood Villages

Several Montgomery County neighborhoods have begun to organize "villages" that coordinate volunteers to provide assistance to seniors who live in the neighborhood. The neighborhood around Burning Tree Elementary School, in Bethesda, was the first neighborhood in Montgomery County to begin organizing its own neighborhood village – called Burning Tree Village (BTV).

Numerous other County neighborhoods have followed BTV's example (often with help and advice from members of BTV), and are in the process of exploring or establishing a village or a similar but less formal organization. These neighborhoods include Bannockburn, Cabin John, Carderock Springs, five Chevy Chase municipalities, Fallsmead, Fleming Park, Garret Park, Kenwood Park, Somerset, and Stonegate. This section describes the progress of six of these neighborhoods.

1. Burning Tree Village

Burning Tree Village (BTV) is a non-profit, tax-exempt organization based in the 440-household neighborhood surrounding Burning Tree Elementary School in Bethesda.² BTV's mission is to "serve residents of our neighborhood who wish to remain in their homes and with their families."³ The impetus to establish Burning Tree Village began with a December 2005 *AARP Bulletin* article describing Beacon Hill Village read by several neighborhood residents.⁴

In the Spring of 2007, several residents of the Burning Tree neighborhood met to discuss the possibility of establishing a neighborhood effort to support aging in place, similar to Beacon Hill Village. With the assistance of the Montgomery County Commission on Aging and staff from the Department of Health and Human Services, the neighbors developed and distributed a survey (in November 2007) to gauge neighborhood interest in the effort. The survey and results are attached at appendix ©37.

² The information about BTV presented in this section is from an interview with Leslie Kessler, a member of the BTV Board of Directors, and from a number of BTV documents, attached at appendix ©16 and ©20.

³ See *Fact Sheet on Burning Tree Aging Project* at p. 3 (February 2008). Attached at appendix ©11.

⁴ See Chapter III for a description of Beacon Hill Village.

U.S. Census data showed that approximately 21% of the Burning Tree neighborhood residents are age 65 and over. The survey responses provided the following additional information:

- 84% of households with seniors wanted to stay in their homes as long as possible;
- Two-thirds of seniors received help from family members; and
- Types of desired assistance included home maintenance, housekeeping, snow and leaf removal, gardening, help with bills and tax preparation, friendly visits, and transportation.

The survey also showed that 48% of respondents were willing to volunteer to help with services such as friendly visiting, grocery shopping, transportation, and telephone check-ins.

Based on this information, the neighbors decided to establish a formal neighborhood village to provide services to seniors and persons with disabilities to help them age in place. The neighbors incorporated Burning Tree Village in the State of Maryland as a nonprofit organization in April 2008, and subsequently received IRS status as a 501(c)(3) tax-exempt organization.

BTV's model for providing services differs from Beacon Hill Village and Capitol Hill Village in two key respects:

- BTV does not have – and currently does not plan to have – any paid staff; and
- BTV does not require neighborhood residents to pay a membership fee in order to receive services through the Village.

BTV does solicit voluntary annual contributions to help with administrative costs and to support BTV-sponsored programs.

The Burning Tree Village Board of Directors has shared BTV's survey and its experiences with numerous other neighborhoods in Montgomery County interested in establishing a village.

Services Provided. BTV is managed and operated by a volunteer Board of Directors and expects that its services ultimately will include:

- Neighbor-to-neighbor assistance;
- Concierge services (e.g., vendor recommendations);
- A medical component (e.g., wellness services, reduced-cost health aides, visiting doctors and nurses);
- Educational activities such as speakers on relevant topics; and
- Social activities to reduce isolation and increase neighborliness.

BTV received and responded to its first request for assistance in late 2008. To coordinate requests for transportation, friendly visiting, and grocery shopping, BTV has partnered with another Montgomery County organization – The Senior Connection. The Senior Connection provides no-cost transportation services for seniors in Montgomery County through community volunteers who use their own cars and gas to transport seniors.

BTV volunteers register as volunteers with The Senior Connection. The Senior Connection provides volunteer training for the BTV volunteers and coordinates requests for transportation by seniors and volunteer drivers in the BTV community. To request services, seniors in the BTV community are directed first to call The Senior Connection. If The Senior Connection cannot provide a needed service, the individual requesting the services is directed to call any member of the BTV Board of Directors, who will help coordinate the needed service.

Funding and support. From the County Government, Burning Tree Village has received support and advice from staff in the Department of Health and Human Services and the Office of Community Partnerships, who also referred BTV members to the Bethesda-Chevy Chase Regional Services Center for assistance. The B-CC Regional Services Center provided BTV with a \$4,000 grant to help with start-up and administrative costs and also provides BTV access to photocopying for its printed materials.

In addition to the grant from the Regional Services Center, BTV's other current source of funding is contributions, which BTV solicits to help defray administrative and program costs. In the future, BTV intends to seek grants to help sustain its services.

From the community, a resident of the BTV neighborhood provided *pro bono* legal support to help the Village incorporate and receive its tax-exempt status. Additionally, Sunrise at Fox Hill, a newly-opened assisted living residence in Bethesda, has offered to provide BTV with meeting space at no cost. Sunrise at Fox Hill has also offered the use of buses and drivers to BTV for programs that require transportation.

2. Bannockburn – Neighbors Assisting Neighbors

Bannockburn is a 450-home neighborhood located in Bethesda, near Glen Echo Park. Bannockburn has formed a neighborhood organization called Neighbors Assisting Neighbors (NAN), which supports seniors aging in place by coordinating requests for assistance with willing volunteers. NAN coordinators distributed a survey to the homes in their community to gauge the interest of neighbors in receiving services or volunteering to help neighbors. The coordinators report finding more individuals interested in volunteering than those who expressed a need for services.

NAN has incorporated as a non-profit organization in the State of Maryland and is in the process of preparing forms to request tax-exempt status from the IRS. NAN is exploring methods to match seniors in need of assistance with volunteers, including using 33 neighborhood Block Coordinators to help coordinate assistance.

NAN is also looking into developing a website. For neighbors in the Bannockburn community who do not have access to the web, but who would like to participate, NAN arranges a web "partner" with a neighbor who has web access. Web options that NAN has explored include using a website called Lotsa Helping Hands (www.lotsahelpinghands.com), which allows a coordinator to create a web community, invite members, and list volunteer opportunities on a calendar. Members can sign up for the opportunities, and the website will email reminders to the volunteers.

3. Fallsmead Community

Fallsmead is a 300-home neighborhood at the western edge of the City of Rockville. Neighbors in Fallsmead began examining neighborhood villages about a year ago, after reading about Beacon Hill Village and learning about Burning Tree Village. Based on surveys from Burning Tree Village and Bannockburn, these neighbors developed and distributed a survey to their community. During this process, residents also attended several County-sponsored meetings addressing aging in place.

Many survey respondents – a majority of whom were age 55 and over – expressed interest in services in the future and indicated a desire to volunteer. However, few survey respondents thought they presently needed services.

Consequently, Fallsmead has developed a neighborhood assistance plan. Neighbors will be able to request a service by contacting neighborhood resident coordinators, who will help facilitate matching requests with willing volunteers. Fallsmead is preparing to inform all neighborhood residents of the assistance plan through its community newsletter.

4. Other Montgomery County Neighborhoods

Chevy Chase Municipalities – Chevy Chase At Home. Five incorporated municipalities of Chevy Chase recently incorporated an organization called Chevy Chase at Home. The five municipalities are Chevy Chase Town, Chevy Chase Village, Village of Chevy Chase Section 3, Village of Chevy Chase Section 5, and Martin's Additions and include approximately 2,500 homes.

Begun in December 2008, Chevy Chase at Home is in the process of establishing policies and procedures for the organization – such as financial policies (i.e., membership dues vs. voluntary contributions) and staff policies (i.e., paid staff vs. volunteers) – and determining how the organization will provide services to neighbors.

Fleming Park Community. The Fleming Park Community is a 400-home community in Bethesda, between the Beltway, Old Georgetown Road, and Grosvenor Lane. This neighborhood is in the very early stages of discussing the formation of a neighborhood village. Fleming Park neighbors have discussed the issue at a neighborhood meeting and have formed a committee to follow-up on the idea. Neighbors have also attended County-sponsored meetings on the issue.

Stonegate Community. Stonegate is a community of approximately 1,300 families in the northeast corner of the County, bounded by New Hampshire Avenue and Bonifant Road. A resident of Stonegate sees a need for the type of services provided by neighborhood villages and is in the process of learning about how to form a village. This resident has attended County-sponsored meetings on this issue, but has not yet formed a neighborhood committee.

CHAPTER VI. County Government Support for Naturally Occurring Retirement Communities and Neighborhood Villages

This chapter describes the County Government's efforts to support the various aging-in-place initiatives launched by non-profit organizations and community members in the County (described in the previous chapter). In sum, the County Government's support has been in the form of providing some financial and/or staff assistance.

- **Part A** provides an overview of the County Government's efforts to support senior aging-in-place initiatives; and
- **Part B** describes the County Government's support for the Community Partners NORC-SSP and the formation of neighborhood villages.

A. County Government Support for Senior Aging-in-Place Initiatives

In recent years, the County Government's work with seniors has included examining ways to help seniors age in place in Montgomery County. Multiple County Government departments have participated in the initiative.

Meetings and reports. The Office of Community Partnerships hosted several meetings in 2008 with County Government staff and community members to discuss aging in place in Montgomery County. The County Government also commissioned two reports to examine issues related to senior aging in Montgomery County:

- *Imagining an Aging Future for Montgomery County, MD*, created by the Center for Productive Aging at Towson University;¹ and
- *Senior Outreach Strategic Communications Report*,² created by Reingold, Inc.

Senior Summit. In May 2008, County Executive Leggett convened a retreat with County department directors to examine how the County "can promote vital aging for all its seniors."³ The Executive then established a Senior Sub-cabinet on Vital Aging and directed staff to hold a "Senior Summit" "to identify priority issues affecting the senior population, develop strategies and action plans to meet current and future needs ... to ensure that Montgomery County is a good place for older adults to live and retire."⁴

The Senior Summit, held in November 2008, produced 177 recommendations that were consolidated into eight categories of action steps. Several of the action steps address issues related to seniors aging in place.⁵ Suggested actions include:

¹ See http://www.montgomerycountymd.gov/Content/PIO/senior/doc/18_Phase_I_strategic_plan.pdf.

² See http://www.montgomerycountymd.gov/Content/PIO/senior/doc/19_Phase_II_strategic_plan.pdf.

³ See Executive Summary of County Executive Leggett's Senior Summit at p. 1 (Appendix ©44).

⁴ Ibid.

⁵ See Senior Summit Follow-Up Action Steps at p. 2 (Appendix ©48).

- Identify naturally occurring retirement communities in Montgomery County;
- Continue support for and expansion of neighborhood villages in Montgomery County;
- Continue support for home-delivered meals and groceries; and
- Educate the public about issues that can help seniors remain in the community.⁶

The executive summary of the Senior Summit also identifies five principles to guide implementation of the action steps. The principles are: diversity, partnerships, civic engagement, planning, and accountability. In practice, these principles include working with private sector partners (e.g., non-profits, businesses, and the faith community); planning efficiently by identifying and implementing evidence-based and best practices; and identifying and tracking measurable goals.⁷

Fire Safety Task Force. Several years ago, County Executive Doug Duncan formed the Senior Citizen Fire Safety Task Force to examine the high number of senior fire deaths in Montgomery County. The Task Force was made up of 25 members from several County Government departments and commissions; and of medical, apartment owner, senior housing management, senior citizen, and community representatives. In September 2008, the Task Force issued a report – *Seniors at Risk: Creating a Culture of Fire Safety* – with 37 recommendations.

Following up on the Task Force report, the Montgomery County Fire and Rescue Services is reviving a program begun in 1994 to knock on neighborhood doors and provide smoke alarms, batteries, and fire safety information. MCFRS has found that seniors are more likely than others to *not* answer their doors for a stranger, even one in a County firefighter uniform. To combat this hurdle, MCFRS staff found that seniors are more likely to speak with a firefighter if another neighborhood resident accompanies the firefighter going door-to-door. Consequently, MCFRS staff are seeking to partner with residents from the neighborhood villages in Montgomery County to try to reach as many seniors as possible through this program.

B. County Government Support for Community Partners and Neighborhood Villages

The County Government has supported the Jewish Federation of Greater Washington's NORC Supportive Services Program – Community Partners – by providing matching funds for federal grant money. The County Government awarded the Jewish Federation of Greater Washington two non-competitive contracts – a \$200,000 contract in FY04 and a \$300,000 contract in FY06. Among other things, these contracts helped fund Community Partners' senior transportation services, health screenings, educational lectures, and in-home health aides.

The County's Office of Community Partnerships; Department of Health and Human Services' (DHHS) Aging and Disability Services; and Bethesda-Chevy Chase Regional Services Center have all contributed to the County's support for neighborhood villages. The County's support for Burning Tree Village and the role of the Bethesda-Chevy Chase Regional Services Center are described in more detail below.

⁶ Ibid.

⁷ Ibid. at p. 3-4.

1. Assistance to Burning Tree Village

The neighborhood around Burning Tree Elementary School in Bethesda was the first Montgomery County neighborhood to develop a village – Burning Tree Village (BTV). In the early stages of the Village’s organization, County staff from the Office of Community Partnerships and DHHS’ Aging and Disability Services, and members of the County’s Commission on Aging met with BTV’s organizers several times, providing expertise and guidance.

To analyze the interest in and need for a neighborhood village, BTV decided to survey neighborhood residents. Staff from DHHS’ Aging and Disability Services helped develop the survey, and copied and mailed it to Burning Tree residents in November 2007. Since November 2007, several other Montgomery County neighborhoods interested in forming villages have borrowed and adapted BTV’s survey to poll their own residents.

County Government staff also referred BTV organizers to the Bethesda-Chevy Chase (B-CC) Regional Services Center (RSC) for assistance. The B-CC Regional Services Center provided BTV a \$4,000 grant to help with start-up and administrative costs and has provided photocopying services for BTV’s printed materials to help BTV defray costs.

2. Role of the Bethesda-Chevy Chase Regional Services Center

Burning Tree Village organizers approached B-CC Regional Services Center staff for assistance when they were in the process of organizing their village. B-CC RSC staff became involved in BTV’s efforts and expanded their assistance to other neighborhoods exploring the village model.

Village forums. As more County neighborhoods began to explore forming neighborhood villages, staff at the B-CC Regional Services Center began developing ways to assist these efforts. On January 21, 2009, Regional Services Center staff convened a forum on Montgomery County villages to provide village organizers a forum for sharing experiences and ideas.

The forum was attended by dozens of community members, elected officials (including Councilmember Roger Berliner and representatives from the offices of Senator Ben Cardin and Congressman Chris Van Hollen), and staff from several County Government departments and offices. At the forum, Burning Tree Village board members gave a presentation, other neighborhoods provided updates on the status of their efforts to establish villages, and forum participants engaged in a roundtable discussion on issues related to village formation. (The Regional Services Centers’ staff meeting notes are at appendix ©52.)

Regional Services Center staff intend to convene forums on a quarterly basis, and followed the January forum with a second forum on April 29, 2009. The April forum included a presentation by the President of Palisades Village in Washington D.C. and updates from Bannockburn’s Neighbors Assisting Neighbors and Chevy Chase at Home.

Following the January 2009 forum, the Regional Services Center staff distributed a summary of village-related issues that it was researching – e.g., creating a non-profit and tax-exempt organization, obtaining professional assistance to develop or find software to coordinate volunteer activities, and using students as volunteers. The summary also described the type of assistance that the RSC could provide for neighborhoods in the process of organizing villages – including photocopying start-up materials and helping to identify public and private grant opportunities. (A copy of this summary is at appendix ©56.)

Villages Resource Exchange. In early February, staff at the Regional Services Center developed a Villages Resource Exchange newsletter to provide tips, resources, and other information for communities considering establishing a village. Regional Services Center staff prepare and post the newsletters on the Regional Services Center website and email a link to the newsletter to people who attended the villages forum and other interested parties. RSC staff sent out newsletters in February and April 2009. (Copies of these newsletters are at appendix ©58 and ©62.). In May 2009, Regional Services Center staff sent out an electronic survey to gauge the type of information readers of the Village Resource Exchange would find useful. (A copy of the survey is at appendix ©72.)

Electronic discussion listserv. In May 2009, Regional Services Center staff established an electronic discussion forum for individuals interested in the village movement in Montgomery County. Staff created an electronic mailing list – called the “villagesgroup” – that allows members to send emails to all other members on the list. This format – called a “listserv” – facilitates discussions of relevant issues and easy dissemination of information relevant to the group.

Volunteer training. In May and June, 2009, the B-CC Regional Services Center sponsored a series of two training sessions for community leaders interested in developing villages in their neighborhoods. The training sessions, entitled “The Care and Feeding of Volunteers: The Why’s and How’s of Volunteer Management,” addressed recruiting, screening, training, and supervising volunteers and other best practices. Barbara Hammack from the Pro Bono Consultant Program of the Montgomery County Volunteer Center led the trainings. (A copy of the training session brochure is at appendix ©77.)

Villages tool kit. Staff from the B-CC Regional Services Center are in the process of developing a tool kit of resources to share with other neighborhoods interested in developing villages and with County Regional Services Centers serving other parts of the County.

CHAPTER VII. Findings

As the baby boom generation ages in the coming years, the proportion of seniors (persons age 65 and over) in the United States will rise accordingly. Montgomery County's demographics mirror those in the country at large:

- In 2005, seniors made up 12% of the County's total population; by 2030 this percentage is projected to increase to 17%;
- In 2005, in absolute numbers, there were 105,000 seniors living in the County; by 2030, this number is projected to be 189,000, an increase of 84,000 senior residents.

Numerous studies report that an overwhelming number of seniors desire to "age in place" – meaning that they want to stay living in their homes or current communities as they age, rather than enter age-restricted senior communities, assisted living facilities, or nursing homes. One study observed that:

The vast majority of Americans want to age in their homes and communities for as long as possible. However, the aging of the population will pose new challenges for the delivery of local services such as health care, recreation, housing, transportation, public safety, employment and education. While these services assist a broad segment of the population, they also have a major impact on the quality of life of older Americans.¹

Based on the County Council's interest in learning more about service delivery to seniors aging in place, this report by the Office of Legislative Oversight (OLO) examines two types of programs that have developed in Montgomery County to deliver services to seniors aging in place: "naturally occurring retirement community" (NORC) supportive services programs; and neighborhood "villages." This chapter presents OLO's findings organized into three sections:

Part A contains six findings based on OLO's review of literature describing the challenges of aging in place and program models to support seniors aging in place;

Part B contains two findings describing the demographics of Montgomery County's seniors, and

Part C contains seven findings summarizing programs in Montgomery County to provide services to seniors aging in place and describing the County Government's efforts to support these programs.

¹ *The Maturing of America: Getting Communities on Track for an Aging Population*, Aging in Place Initiative at p. 1 (2006).

A. AGING IN PLACE

Finding #1: The great majority of seniors want to remain living in their homes or communities as they age.

Survey research consistently reports that seniors express a strong preference to remain in their homes or communities as they age, rather than move to age-restricted senior communities, assisted living facilities, or nursing homes. In its 2005 *Beyond 50.05 Survey*, the American Association of Retired Persons found that among people age 65 and over:

- 93% want to stay in their current homes for as long as possible;
- 65% had lived in their current communities for at least 20 years; and
- 88% want to be living in the same community five years into the future.

Similarly, the Montgomery County Planning Department's 2005 *55+ Housing Preference Survey* found that among Montgomery County residents age 55 and over:

- 58% expect to be living in the same home ten years into the future; and
- 81% indicated that if/when they move from their current residence, they would *not* prefer to live in seniors-only housing.

Finding #2: Seniors who age in place often face common challenges related to caring for themselves and their homes.

Frequently cited challenges faced by seniors aging in place include decreased mobility, difficulty in caring for themselves and their homes, and difficulty staying involved in their communities. The literature on aging in place describes challenges for seniors associated with:

- Personal care;
- Transportation;
- Health care;
- Home repair and maintenance;
- Personal safety;
- Community involvement; and
- Appropriate housing.

Many national organizations that work on behalf of seniors advocate that communities develop policies, programs, and services to meet these challenges “to promote the quality of life and the ability of older adults to live independently and contribute to their communities for as long as possible.”²

² See *The Maturing of America: Getting Communities on Track for an Aging Population*, Aging in Place Initiative at p. 1 (2006).

Finding #3: In contrast to a living arrangement designed exclusively for seniors, a NORC is a community that naturally evolves over time to include a relatively large concentration of senior residents.

A naturally occurring retirement community (known as a NORC) can develop in a neighborhood, in a rental apartment or condominium complex, or even in a rural community. First described in academic literature in 1985, NORCs develop naturally either as senior residents age in place or when seniors move into a non-age-restricted community.

The defining characteristics of a NORC vary widely, but generally include: a geographic designation; a minimum concentration of seniors; and a minimum age for identifying seniors. Most academic literature defines a NORC as a community where seniors account for at least 40 to 65 percent of the residents; the minimum age for identifying seniors ranges from 50 to 65 years old.

Finding #4: NORC supportive services programs (NORC-SSPs) are programs and services designed to help seniors living in NORCs to age in place.

NORC supportive services programs seek to bring various entities together – such as social service providers, health care providers, transportation providers, housing corporations, and residents – to provide services that address both the needs and preferences of NORC residents, such as:

- Social work case management;
- Home care (emergency or general);
- Transportation;
- Meals;
- Social and cultural events;
- Mental health services;
- Bereavement support;
- Exercise classes; and
- Health care management and prevention activities (i.e., blood pressure screenings).

Across the country, different types of entities organize and coordinate NORC-SSPs, e.g., local governments, community service agencies, building management.

One federal government study found in four out of five case studies, the impetus for a NORC-SSP came from the provider serving the NORC, not the residents themselves. Examples of specific challenges that arise when NORC-SSPs are driven by outside entities rather than residents include: “securing the cooperation of building managers in program development and service delivery, gaining resident participation and support, and communicating with residents and getting to know their needs.”³

³ Barbara Ormond et al. (of The Urban Institute), *Supportive Services Programs in Naturally Occurring Retirement Communities*, for the Office of Disability, Aging and Long-Term Care Policy, U.S. Department of Health and Human Services at p. v (November 2004).

Finding #5: NORC supportive services programs frequently face funding and other challenges.

NORC supportive services programs primarily receive funding from four sources:

- Private sector donations or contributions;
- Charitable donations;
- Membership or activity fees from residents; and
- Federal, state, or local government grant funding.

Between FY02 and FY05, the U.S. Department of Health and Human Services' Administration on Aging (AOA) provided a combined \$21.4 million in grant funding for NORC-SSPs located across 25 states. AOA awards ended in FY05, and NORC-SSPs that lacked a sustainable stream of funding have either had to reduce service levels or stop operating altogether.

Program-related challenges facing NORC-SSPs include difficulty in providing services in less densely populated communities; challenges to maintaining ongoing communication among service providers and residents; limitations in NORC-SSPs' abilities to address the comprehensive needs of seniors aging in place; and limited data for evaluating program outcomes.

Finding #6: Some communities or neighborhoods have developed their own organizations to provide services to seniors who are aging in place in the community; these are commonly referred to as neighborhood "villages."

A community in Boston, Massachusetts organized the first neighborhood village – Beacon Hill Village – in 2001. Villages commonly define their potential membership based on geographic boundaries, and may not include enough senior residents to technically qualify as a NORC.

Common services provided to seniors by villages are:

- Transportation;
- Social and educational programs and events;
- Friendly visits or phone calls;
- Information and referrals for services, such as home maintenance and personal care; and
- Help with household repairs and maintenance.

Some villages provide services and/or programs only for members who pay membership dues to the village while other villages provide services and programs without charging membership dues. Some villages set a minimum age limit for membership. Overall, government has not played a large role in the development or support of villages.

Like NORC-SSPs, villages face some common challenges, including finding sustainable funding and persuading seniors to use village services. Many villages incorporate as not-for-profit organizations and receive federal tax exempt status from the Internal Revenue Service (IRS), which then allows individuals to deduct contributions to these villages from their federal taxes.

The village model is relatively new, and there is no formal research on whether the services that villages provide help seniors to stay in their homes longer.

B. SENIOR DEMOGRAPHICS IN MONTGOMERY COUNTY

Finding #7: In 2005, seniors (persons age 65 and over) accounted for approximately 12% of Montgomery County's population.

In 2005, approximately 12% of Montgomery County's total population of 931,000 was age 65 and over. Seniors age 65 to 74 comprised 6% of the population (52,539) and seniors age 75 and over comprised about 6% of the population (52,264).

In 2005, the four planning areas with the highest concentrations of seniors in the County were: Aspen Hill (20%), Bethesda/Chevy Chase (18%), North Bethesda (17%), and Potomac/Cabin John (15%).⁴ The four planning areas with the largest *number* of seniors were: Aspen Hill, Bethesda/Chevy Chase, Kensington/Wheaton, and Gaithersburg; each with over 10,000 seniors.

In 2005, A notably higher percent of County seniors are non-Hispanic white compared to the overall County population. As the data below show, 56% of the total population was non-Hispanic white, compared to 71% of residents age 65-74 and 77% of residents age 75 and over.

Age Group	Percent White (non-Hispanic)	Percent Black	Percent Asian	Percent Hispanic
MONTGOMERY COUNTY	56	17	13	14
Age 65-74	65	14	14	7
Age 75+	77	8	8	7

Source: 2005 Census Update Survey, Montgomery County Planning Department

Note: Percents may not sum to the total due to rounding

Finding #8: Between 2005 and 2030, the number of seniors living in households in Montgomery County is projected to increase at a faster rate than non-seniors.

Between 2005 and 2030, Montgomery County's senior population is projected to increase by 81% (from 105,000 to 189,000 residents), while the non-senior population is projected to increase 14% (from 823,000 to 937,000 residents). The fastest growing cohort is seniors age 65 to 74, which is projected to more than double over the next 25 years. The County's demographic trends mirror a national trend caused by baby boomers beginning to turning 65 in 2011.

By 2030, the number of seniors is projected to increase in 20 out of 21 of the County's planning areas. Several planning areas are poised for large percentage increases in their senior population (e.g., Clarksburg, Germantown, Darnestown); however, many of these planning areas will still have relatively smaller numbers of seniors when compared to the more populated areas of the County. Aspen Hill is the only planning area projected to see a decrease in the number of seniors residents, although the number of seniors will still be large comparatively (5th out of 21 planning areas).

⁴ The County has 28 total planning areas. For the 2005 Census Update Survey, the County Planning Department combined several planning areas together under the name of one planning area and refers to these as "[planning area] and vicinity." Consequently, 2005 data identifies 21 planning areas or combinations thereof.

C. AGING IN PLACE PROGRAMS IN MONTGOMERY COUNTY

Finding #9: In 2003, the Jewish Federation of Greater Washington established the first (and only) NORC supportive services program in Montgomery County.

In 2003, the Jewish Federation of Greater Washington established a NORC-SSP – called Community Partners. Between FY03 and FY05, the Jewish Federation received two grants totaling over \$2 million from the federal government (DHHS’ Administration on Aging) for the Community Partners program. The County Government simultaneously awarded the Jewish Federation two non-competitive contracts as required matching funds for the federal grants – a \$200,000 contract in FY04 and a \$300,000 contract in FY06. Among other things, these contracts helped fund transportation services, health screenings, and in-home health aides.

Community Partners began as a collaboration of six non-profit organizations providing services (listed below) to seniors age 60 or over residing in condominium or rental apartment buildings in Montgomery County identified by Community Partners staff as NORCs. Between 2003 and 2008, Community Partners provided services at various times in nine different locations.

Organization	Service(s) Provided
Jewish Federation of Greater Washington	<ul style="list-style-type: none"> • Administration of Community Partners
Jewish Social Service Agency	<ul style="list-style-type: none"> • On-site service • Social work groups (education, socialization, health, etc.) • Care Management • Information and referral • Financial subsidy oversight
Jewish Community Center of Greater Washington	<ul style="list-style-type: none"> • Exercise classes • Parties and social hours • Trips to movies, theaters, museums, gardens, and lectures • On-site book clubs, game nights, art programs
Premier Home Health	<ul style="list-style-type: none"> • 24-hour emergency alert service • Homemaker cleaning services • Blood pressure clinics • Health and wellness seminars • Home safety assessments
Jewish Council for the Aging	<ul style="list-style-type: none"> • “Smooth Riding” transportation service to medical appointments, shopping and other destinations • Bus transportation for trips • Routed transportation
Jewish Information and Referral Service	<ul style="list-style-type: none"> • Information and referrals on numerous topics for seniors in the local and broader community. • A to Z information booklets

Finding #10: With the federal grant ending in June 2009, Community Partners has changed its model for providing services to seniors from a NORC-SSP to a fee-based membership organization.

In 2008, in anticipation of its federal funding ending in June 2009, Community Partners changed its program model to a fee-based membership organization (\$120/year membership fee, pro-rated monthly) open to all County seniors, providing services for its members at different locations in the County. In November 2008, Community Partners stopped providing the services described above in specific NORC-designated buildings.

Community Partners' current programming includes monthly social excursions, a monthly "Day @ the J" (Jewish Community Center of Greater Washington) program, movies, lunches at local restaurants followed by entertainment, and supplemental programming at several local senior kosher nutrition sites. In November 2008, Community Partners also started to provide programming for Leisure World's "Jewish Residents of Leisure World" group, which includes more than half of Leisure World's approximately 2,000 residents.

Community Partners currently has funding from the State and private grant funding. Staff are also exploring recently-announced opportunities for federal funding for aging-in-place initiatives.

Finding #11: The neighborhood around Burning Tree Elementary School in Bethesda was the first in the County to organize a neighborhood village.

In the Spring of 2007, several residents in a neighborhood around Burning Tree Elementary School in Bethesda discussed the possibility of establishing a neighborhood effort to support aging in place, similar to Boston's Beacon Hill Village. Assisted by the County's Commission on Aging and staff from the Department of Health and Human Services, the residents developed and distributed a survey (in November 2007) to gauge neighborhood interest in the effort.

Based on survey responses showing that 84% of households with seniors wanted to stay in their homes as long as possible and that 48% of survey respondents were willing to volunteer to help with services, the neighbors decided to establish a formal neighborhood village. In April 2008, Burning Tree Village (BTV) incorporated as a non-profit organization, and subsequently received IRS status as a 501(c)(3) tax-exempt organization.

Services. BTV is managed and operated by a volunteer Board of Directors and provides services free of charge to neighborhood residents. It is anticipated that, over time, BTV will offer:

- Neighbor-to-neighbor assistance;
- Concierge services (e.g., vendor recommendations);
- A medical component (e.g., wellness services, reduced-cost health aides, visiting doctors and nurses);
- Educational activities such as speakers on relevant topics; and
- Social activities to reduce isolation and increase neighborliness.

BTV has partnered with another Montgomery County organization – The Senior Connection – to coordinate requests for transportation, friendly visiting, and grocery shopping. The Senior Connection provides free transportation services for Montgomery County seniors through community volunteers.

Funding and support. The Bethesda-Chevy Chase Regional Services Center gave BTV a \$4,000 grant to help with start-up and administrative costs. BTV has also received private contributions and *pro bono* legal assistance. Additionally, Sunrise at Fox Hill, a newly-opened assisted living residence in Bethesda, has offered BTV free meeting space and the use of buses and drivers for programs that require transportation.

Assistance to other neighborhoods. Members of the Burning Tree Village Board of Directors have shared BTV's survey and their experiences with numerous other neighborhoods in Montgomery County interested in establishing villages.

Finding #12: Other Montgomery County neighborhoods are in the process of exploring or establishing villages or similar, but less formal organizations.

A number of other County neighborhoods have identified potential needs of older neighbors who are aging in place. In response to these needs, these neighborhoods are in varying stages of organizing villages or similar but less formal groups to provide assistance to seniors. For example:

Bannockburn – Neighbors Assisting Neighbors. Bannockburn, a 450-home neighborhood located in Bethesda, formed a neighborhood organization called Neighbors Assisting Neighbors (NAN) to support seniors aging in place by coordinating requests for services with volunteers. NAN incorporated as a non-profit in the State of Maryland and will request tax-exempt status from the IRS. NAN is currently exploring methods to match seniors needing services with volunteers.

Chevy Chase Municipalities – Chevy Chase At Home. Five incorporated Chevy Chase municipalities – Chevy Chase Town, Chevy Chase Village, Village of Chevy Chase Section 3, Village of Chevy Chase Section 5, and Martin's Additions – recently incorporated "Chevy Chase at Home" to provide services to seniors in the approximately 2,500 homes in these neighborhoods. Organization leaders currently are establishing policies and procedures for the organization and determining how the organization will provide services.

Fallsmead. Fallsmead is a 300-home neighborhood at the western edge of the City of Rockville. Based on results from a survey distributed to neighborhood residents, Fallsmead has developed a neighborhood assistance plan. Neighbors will be able to request a service by contacting neighborhood resident coordinators, who will help facilitate matching requests with willing volunteers.

Other neighborhoods involved in this process are: Cabin John, Carderock Springs, Fleming Park, Garrett Park, Kenwood Park, Somerset, and Stonegate.

Finding #13: In recent years, multiple County Government departments have examined ways to help seniors age in place in Montgomery County.

Multiple County Government departments have participated in the County Government's senior initiatives. The County Government also commissioned two reports to examine issues related to senior aging in Montgomery County:

- *Imagining an Aging Future for Montgomery County, MD*, created by the Center for Productive Aging at Towson University; and
- *Senior Outreach Strategic Communications Report*, created by Reingold, Inc.

In May 2008, County Executive Leggett convened a seniors-related retreat with County department directors and directed staff to convene a "Senior Summit" "to identify priority issues affecting the senior population, develop strategies and action plans to meet current and future needs ... to ensure that Montgomery County is a good place for older adults to live and retire."

The November 2008 Senior Summit produced 177 recommendations that were consolidated into eight categories of action steps. Several of the action steps address issues related to seniors aging in place. Suggested actions include:

- Identify naturally occurring retirement communities in Montgomery County;
- Continue support for and expansion of neighborhood villages in Montgomery County;
- Continue support for home-delivered meals and groceries; and
- Educate the public about issues that can help seniors remain in the community.

Finding #14: County Government staff are providing in-kind support to County neighborhoods that want to develop villages.

Staff in the Office of Community Partnerships, the Department of Health and Human Services' Aging and Disability Services and the Bethesda-Chevy Chase Regional Services Center are helping County neighborhoods develop villages to support their resident seniors. The table below summarizes the types of assistance provided.

Type of Assistance	Office of Community Partnerships	DHHS' Aging and Disability Services	B-CC Regional Services Center
Providing expertise and guidance	✓	✓	✓
Helping develop a neighborhood survey to gauge residents' interests and needs		✓	
Copying and mailing neighborhood survey and helping analyze survey results		✓	
Providing grant money to defray start-up and administrative costs			✓
Facilitating discussion of villages among County neighborhoods			✓
Photocopying			✓

Finding #15: Staff from the Bethesda-Chevy Chase Regional Services Center have developed resources for neighborhoods exploring the village model.

B-CC Regional Services Center (RSC) staff started working with villages when they were approached by the Burning Tree Village organizers. Since then, B-CC RSC staff have expanded their assistance to other neighborhoods exploring the village model.

Village forums. The Regional Services Center staff have convened two discussion forums – in January and April 2009 – to provide village organizers a place for sharing experiences and ideas. Going forward, RSC staff intend to convene forums on a quarterly basis.

Villages Resource Exchange. Regional Services Center staff developed a Villages Resource Exchange newsletter with resources and information for communities considering establishing a village. To date, staff have issued two newsletters (February and April 2009); staff also conducted an electronic survey in May 2009 to find out what information readers of the Village Resource Exchange would find useful.

Electronic discussion listserv. In May 2009, Regional Services Center staff established an electronic discussion forum for individuals interested in the village movement in Montgomery County. The listserv allows members to send emails to all other members on the list, facilitating discussions of relevant issues and allowing easy dissemination of information relevant to the group.

Volunteer training. In May and June, 2009, the Regional Services Center sponsored a series of two training sessions for community leaders interested in developing villages in their neighborhoods. The training sessions, entitled “The Care and Feeding of Volunteers: The Why’s and How’s of Volunteer Management,” addressed recruiting, screening, training, and supervising volunteers and other best practices.

Villages tool kit. Staff from the B-CC Regional Services Center are in the process of developing a tool kit of resources to share with other neighborhoods interested in developing villages and with County Regional Services Centers serving other parts of the County.

CHAPTER VIII. Recommendations

This chapter outlines the Office of Legislative Oversight's four recommendations for Council action. The recommendations are aimed at enhancing the Council's understanding of County Government support for programs providing services to seniors aging in place.

Recommendation #1: Request an update on the demographics of County seniors as soon as the 2010 U.S. Census data become available.

For this report, OLO used the most recent demographic data about seniors in the County – a combination of the 2000 U.S. Census and the 2005 Census Update Survey. The 2000 information, which provides data about County residents by small geographic subsections of the County, is almost ten years old. The more recent 2005 data set is limited because the details are only available by County planning areas.

Beginning next year, the U.S. Census Bureau will conduct the 2010 Census, and the newer data will become available beginning in 2011. OLO recommends that the Council request the Montgomery County Planning Department provide an update on the demographics of seniors in the County as soon as the 2010 Census data become available.

Recommendation #2: Monitor the development of neighborhood villages in the County and the County Government's support of these programs.

As reviewed in the report (Chapter VI), County Government staff from multiple departments have provided in-kind contributions (and some funding) to support the development of neighborhood villages in the County. OLO recommends that the Council request periodic updates from the Chief Administrative Officer on the status of neighborhood villages in the County, including a description of the County Government's continued involvement. Specific questions for the CAO to address should include:

- a. Which County neighborhoods or communities are operating villages or similar organizations? How are these organizations structured? How many residents have requested or been provided services?
- b. Which neighborhoods or communities are exploring the development of a village?
- c. How are County Government departments or offices currently involved in the development of neighborhood villages?

Recommendation #3: Convene a worksession to discuss the County Government’s policy and role regarding Montgomery County seniors aging in place.

The concept of “aging in place” has different meanings in different contexts. To some people, it refers specifically to seniors remaining in a home lived in for years or decades. To others, it refers to seniors who continue to live in their community (perhaps moving to a small home, condominium, or apartment) rather than moving to assisted living facilities or nursing care.

This report described some of the challenges commonly cited by seniors who choose to age in place, and examined two types of programs that have developed in the County – NORC-SSPs and neighborhood villages. In March 2009, the Council’s Health and Human Services Committee received a briefing on the County Executive’s Senior Summit Action Plan, which addressed a number of the broader issues related to aging in place.

In the context of the Council’s continued dialogue with the Executive Branch about County Government services to seniors in the County, OLO recommends that the Council’s Health and Human Services Committee convene a worksession with Executive Branch and community representatives with a specific focus on the County Government’s role with respect to seniors aging in place. Specific questions to discuss at this worksession should include:

- a. How should the County Government define “aging in place” when developing policies or programs related to senior aging?
- b. What is the full range (and cost) of services that the County Government currently provides to help seniors age in place?
- c. Are there data available for measuring the extent to which the demand for services to assist seniors aging in place is being met, taking into consideration programs and services available through the public, private, and non-profit sectors?
- d. Given the likelihood of an increasing demand for these services, should the County develop a policy for guiding the design and offerings of County programs and services aimed at helping seniors age in place?

Recommendation #4: Identify additional requests for research and analysis related to meeting the needs of the County’s senior residents.

The body of research and issues related to seniors aging in place is both vast and complicated. The focus of this OLO report was on a relatively small and contained piece – two specific models for providing in-home services to seniors who are aging in place – NORC-SSPs and neighborhood villages.

OLO recognizes that the Council’s discussion of NORC-SSPs and neighborhood villages is likely to spark broader questions related to how the County Government is serving the needs of the County’s seniors. OLO recommends the Council use this opportunity to compile a list of the Council’s requests for research and analysis needed for future discussions about meeting senior residents’ needs. OLO will then work with central Council and Executive Branch staff to provide the needed information to the Council in a timely manner.

CHAPTER IX. Agency Comments on Final Draft

The Office of Legislative Oversight circulated a final draft of this report to the Chief Administrative Officer for Montgomery County, the Department of Health and Human Services, the Office of Community Partnerships, the Bethesda-Chevy Chase Regional Services Center, the Montgomery County Planning Board, and the Montgomery County Planning Department. OLO appreciates the time taken by agency representatives to review the draft and provide comments. OLO's final report incorporates technical corrections and comments provided by agency staff.

The written comments received from the Chief Administrative Officer are attached in their entirety and begin on the following page.



OFFICES OF THE COUNTY EXECUTIVE

Isiah Leggett
County Executive

Timothy L. Firestine
Chief Administrative Officer

M E M O R A N D U M

June 10, 2009

TO: Karen Orlansky, Director, Office of Legislative Oversight

FROM: Timothy L. Firestine, Chief Administrative Officer

SUBJECT: Response to Office of Legislative Oversight Report 2009-11, "Naturally Occurring Retirement Communities and Neighborhood Villages"

I want to commend the Office of Legislative Oversight (OLO) upon completion of **Report Number 2009-11 "Naturally Occurring Retirement Communities and Neighborhood Villages."** This report provides a comprehensive and detailed analysis of the emergence of naturally occurring retirement communities (NORCS) and neighborhood villages in Montgomery County and the related opportunities and challenges which will help guide current and future policy, budget and service delivery decisions. County Executive Leggett established the director-level Sub-cabinet on Senior Vital Living and convened the November 11, 2008 County Executive's Senior Summit to proactively address the key issues that research in the areas of gerontology, health and aging policy have identified as critical to successful aging. This OLO Report will significantly contribute to these ongoing efforts in which the Senior Sub-cabinet and our numerous private partners are engaged.

The research methods and personal interactions of OLO staff involved in this effort were conducted in a highly professional and collaborative manner. Therefore, it is not surprising that there are no points of substantive controversy in the report's analysis, findings or recommendations. (As requested, technical corrections or considerations have been provided directly to Ms. Leslie Rubin, OLO Legislative Analyst).

Executive staff would like to pose a few considerations that provide additional context for considering the complex issue of "aging in place" and that will hopefully contribute to a creative, constructive and more robust discussion of OLO Report 2009-11 at the July 16, 2009 Council Health and Human Services Committee session. These considerations (where applicable) will be organized in response to each of the four (4) study recommendations.

Recommendation #1: Request Demographic Update from 2010 U.S. Census

Response: Concur

With updated Census data, a stronger and more complex demographic case can and should be made for the array of services required to promote safe and appropriate aging-in-place and vital aging in general. Additionally, we need to continually draw upon the results of national, regional, State and local survey data that provides information related to housing preferences of different age cohorts, in-migration/out-migration (stratified by age cohort), and other items connected to the aging-in-place phenomena. (See response to Recommendation #3 below).

Recommendation #2: Monitor the Development of Villages and County's Support

Response: Concur

In its March 12, 2009 briefing to the HHS Committee, members of the Executive's Senior Sub-cabinet on Vital Aging provided an update on activities related to emergence of neighborhood villages and the role of County government in facilitating the formation of these villages.

We have witnessed accelerating interest in this subject both in Montgomery County and nationwide since late 2007. Beginning in the fall of 2007, the Office of Community Partnership (OCP) initiated discussions on aging in place with the Burning Tree community leaders. During the course of 2008, OCP hosted several additional sessions involving other communities primarily in the Bethesda area to facilitate the sharing of information. The Department of Health and Human Services/Aging & Disability Services were partners in this effort. These sessions included a number of providers of services to seniors, as well as representation from Rockville and Gaithersburg. The Bethesda-Chevy Chase Regional Services Center (BCCRSC) also became involved in supporting these communities in late spring of 2008. OCP, BCCRSC and DHHS staff maintain regular contact with the leadership of the Burning Tree Village and the now approximately 15 other emerging villages.

Facilitating the ability of older adults to age in place was identified as a top priority by participants in the County Executive's November 20, 2008 Senior Summit. Summit participants further identified the need for technical support to neighborhoods interested in the creating a Village model for facilitating neighbor-to-neighbor help as a short-term goal towards addressing this priority.

In response to this goal, BCCRSC and OCP hosted "Villages" forums in January 2009 and April 2009 to create an opportunity for residents to become familiar with County resources; learn about existing community efforts; and discuss opportunities for partnerships with the County, private service providers, and other communities. The forums also provide an opportunity for the sharing of lessons learned and the strategic challenges facing Village initiatives.

Additionally, the BCCRSC has created a Villages newsletter and is compiling a “toolkit” that will provide tips, resources, and other information for communities considering establishing a Village.

Although to date, as noted in the OLO report, the focus on these emerging Villages has been in the Bethesda-Chevy Chase area, the topic of how to foster similar community efforts in less affluent and more rural portions of the County has been discussed since the first meetings in the fall 2007. The Senior Sub-cabinet which has representation from the five Regional Service Centers will continue to address this topic in its implementation of recommendations from the Senior Summit.

Recommendation #3: Convene a worksession to discuss the County Government’s policy and role regarding Montgomery County seniors’ aging-in-place.

Response: Concur

The concept of “Aging-in Place” first surfaced over twenty years ago to reflect the social phenomena and personal preference of older persons to stay in their own homes. It serves as an anchor element of housing and aging policies, and was a major focus at the 2005 White House Conference on Aging (Pynoos and Cicero, 2009). The goal of aging in place was articulated in slightly different terms and focused on a different population in the United States Supreme Court’s 1999 *Olmstead Decision* wherein the court ruled that integration is fundamental to the purposes of the Americans with Disabilities Act and that states may be required to provide services in the most integrated/least restrictive community setting. Indeed, it is reasonable to assert that the approximately 31 programs and a very high percentage of the over \$32 million identified in OLO Report 2005-3 “An Inventory of County Government Programs Designed to Serve Seniors” have their objective the promotion of aging in place via the delivery of services in the most integrated community setting. Within the Department of Health and Human Services, the explicit mission of Aging & Disability Services is *“To affirm the dignity and value of seniors, persons with disabilities and their families by offering a wide range of information, services, protections and opportunities which promote choice, independence and inclusion.”* (Emphasis added).

More recently, however, gerontologist and aging policy specialists are suggesting a need for a counterbalance to the “unbridled enthusiasm” for aging in place (Golant 2009). Questions are increasingly being raised regarding the supposed benefits to elderly individuals remaining in their own homes often in social isolation and in an unsafe environment of high personal risk. Among the reasons given by a growing number of researchers skeptical of the “holy grail” of aging in place are:

- Surveys indicating that a high percentage of seniors want to remain in their own homes “at all costs” typically pose the options as remaining in one’s own home with family assistance or entering a nursing home. Given this virtual forced-choice of restricted options (and the fact that a large number of older adults state that they “would rather die

than enter a nursing home”), it is little wonder that respondents strongly favor staying in place.

- Surveys regarding “future housing preferences” fail to disaggregate the preferences of healthy 50 and 60 year olds from frail adults in their 70 and 80s.
- Where available and affordable housing options exists, and when older adults are aware of these options, might we see a lessening in the aging in place inclinations of seniors?
- It is estimated that about 71 percent of low-income senior home owners occupy dwellings built over 30 years ago (Gershon et al., 2008) with many in physical disrepair and therefore a danger or at least health hazard to older occupants.

Clearly, these considerations are especially salient when addressing the needs of low-income and less independent older adults in a County such as ours where acceptable housing options are often unavailable and unaffordable (M-NCPPC 2005 Report, “Affordable Assisted Living Tops Senior Housing Needs”). In the concept paper on “Housing and Zoning” commissioned for the November 2008 County Executive’s Senior Summit, four challenges are presented if we are to provide County residents the opportunity to meet their housing preferences and needs as they age:

- Enhance coordination between housing and service funding and providers.
- Increase County residents’ access to information about housing choices and related services appropriate to their needs.
- Educate seniors, their families and landlords about options to enhance livability and visitability of their homes as they age.
- Monitor the housing preferences of baby boomers as they age and accommodate them to the degree possible. (Roman, 2008)

The goal of promoting aging in place will continue to be a driving force, anchor principle and guiding philosophy in public policy and service delivery. However, it should not be viewed as a “one size fits all” approach nor should it be assumed de facto to be in the best interest of the older individual or community.

We look forward to further discussions among Executive Branch staff, Councilmembers and other public and private stakeholders on both the benefits and drawbacks associated with aging in place. These discussions would be instructive to the development of more specific policy guidance regarding the County government’s role and limits in enabling older residents to age in place.

Recommendation #4: Identify additional requests for research and analysis related to meeting the needs of the County’s senior residents.

Response: Concur

Karen Orlansky, Director
June 10, 2009
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Again, on behalf of the County Executive staff involved in this collaborative effort, I want to convey my appreciation to OLO for providing us with this very useful report that will enable us all to better address the current and emerging needs of Montgomery County seniors in an effective, efficient and responsive manner.

TF/jk

cc: Uma S. Ahluwalia, Director, Department of Health and Human Services
Bruce Adams, Director, Office of Community Partnership
Kathleen Boucher, Assistant Chief Administrative Officer
Dr. John J. Kenney, Chief, Aging and Disability Services
Kenneth Hartman, Director, BCC Regional Service Center

NATURALLY OCCURRING RETIREMENT COMMUNITIES AND NEIGHBORHOOD VILLAGES

APPENDICES

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SENIORS AND THE CITY



SOLUS-VEERVOORBS

More than two decades ago, Michael Hunt noticed something interesting about Hilldale, a well-established neighborhood in Madison, Wisconsin. Elderly people were moving into its apartment houses in large numbers at the same time that builders and developers were struggling—and failing—to attract seniors to assisted-living communities designed for their needs. What struck Hunt, an architect and professor of urban planning at the University of Wisconsin, was that Hilldale, with apartments set close to a local library and small shopping center, was senior-friendly but not senior-segregated. Even more to the point, it was warm and welcoming to the many widowed women who moved in there. The apartment buildings were almost like dorms, with hallways that were, he says, “socially alive.” Hunt had spotted something that seemed novel—what he called “a naturally occurring retirement community,” or NORC.

Although the phrase was new, the phenomenon Hunt saw wasn’t. Virtually every community in the country has a NORC. In some instances, it’s the apartment complex people move to after their spouse dies. In others, it’s a neighborhood where the children have left and residents are aging in place. According to the American Association of Retired People, more than a quarter of seniors already reside in NORCs. As the baby boom generation approaches retirement, demographers expect the growth of NORCs will accelerate dramatically.

“We need to be designing communities in which people can age in place,” Hunt is convinced. “There is no way to

have enough age-specific housing to take care of the elderly.”

Around the same time that Hunt was noticing aging patterns in Hilldale, Fredda Vladeck was a social worker at St. Vincent’s Hospital in Manhattan. Vladeck had noticed that an increasing number of older New Yorkers were showing up in the St. Vincent’s emergency room with fractures or injuries suffered in falls. One housing development in particular stood out: a 2,820-unit co-op called Penn South.

Established by the International Ladies Garment Workers Union in 1963, Penn South was home to a large concentration of former union members, many of them single women. But as Penn South’s residents aged, their health began to deteriorate. Now, they were appearing at the hospital in disproportionately large numbers.

When Vladeck called the building’s managers, they acknowledged the problem and asked if St. Vincent’s could help by placing a geriatric nurse and a social worker on site. But Vladeck felt the issue was more about psychology than services. She knew that most older adults resist connecting with services until an acute crisis forces them to. And the residents of

Penn South were no exception. What was needed, she felt, was a “conversation changer” where it’s acknowledged by all that “this is an aging-in-place community, and there are things we can do in the community to make aging as normal as possible.”

Vladeck had heard the term NORC. Now, she set out to turn a demographic description into a service model—one that could combine the outreach aspects of

MOST BABY BOOMERS HOPE TO AGE IN PLACE. SHOULD GOVERNMENT PLAY A ROLE IN MAKING THAT HAPPEN?

By John Buntin

community organizing with traditional social services, such as support for home health aides. Backed by the United Jewish Communities, an umbrella group for hundreds of Jewish philanthropies, she created a model that has emerged as one of the most promising ideas for meeting the coming surge of retiring baby boomers.

In some ways, supporting NORCs is a no-brainer for state and local government officials. Demographers estimate that 90 percent of baby boomers will age in place. Making sure NORCs have amenities such as curb cuts, mass transit, libraries and other clusters of services is common-sense urban

city was funded in part by a \$1-per-month fee that was added to participating residents' rents. There was no automatic way to levy a similar fee on residents of Floral Park. Instead, UJA turned to community organizers to canvas the neighborhood, surveying residents about their priorities, organizing residents into a group that could define its own priorities and helping them connect with services. Local politicians, block associations, local businesses—everyone was brought in.

By 2005, the Floral Park NORC had taken root. Other New York state and local politicians quickly scrambled to get programs of their own. In 2006, the state passed legislation that

SOME NORCS RECEIVE SUBSTANTIAL GOVERNMENT FUNDING, WHILE OTHERS DEPEND ON FEES PAID BY MEMBERS. RESEARCHERS DIFFER ON WHICH SYSTEM WORKS BEST.

planning. The other alternatives—assisted-living facilities or nursing homes—are both associated with huge expenses, most of which are borne by state Medicaid programs, and a jarring decline in senior well-being.

But the push to expand government support for NORCs raises broader and more nettlesome issues. Up to this point, NORC services have been funded primarily by foundations and through modest fees paid by their beneficiaries. In making the argument that it's time for government to step forward, philanthropies are pursuing an old and familiar path: The nonprofit develops and pilots innovative programs, then government takes over. But given the current fiscal crisis (and the approaching retirement of millions of baby boomers), can government afford to help NORCs? Or, frankly, can it afford *not* to? It's a debate not just about how government should promote aging in place but about the role of government itself.

Vladeck's work at Penn South is a case in point. Soon after her efforts got underway, her program caught the attention of the United Jewish Association Federation of New York. The reason was demographically driven. About 25 percent of the Jewish population is 65 and over, roughly twice the national average. "The Jewish community's older adult population, as a percent of community, is where rest of the country will be in 20 years," says Rob Goldberg, senior director for legislative affairs at the United Jewish Communities. "So we are already dealing with the challenges of long-term care."

The UJA Federation set out to replicate Vladeck's NORC model in other high-rise apartment complexes where half or more of the residents were seniors. In 1999, the city of New York funded an effort to extend the model to the Deepdale Gardens apartment complex in the borough of Queens. Vladeck and the UJA decided to take the concept even further. They created a prototype "horizontal" NORC in next-door Floral Park, a neighborhood of modest single-family homes, many of them occupied by older residents.

The effort was challenging. A typical "vertical" NORC in the

created a neighborhood NORC model. New York now contributes \$4.4 million to 17 horizontal or "neighborhood" NORCs and another 40 "vertical" NORCs statewide. New York City's budget provides another \$5.5 million, plus \$1 million more in earmarks. As a result, some 67,000 New Yorkers live in officially supported aging-in-place communities based on the NORC model.

NORCs are going nationwide. In recent years, United Jewish Communities has helped underwrite more than 50 NORCs in communities around the country. As the idea has expanded, state and local governments are becoming increasingly important partners. In early 2003, the Atlanta Regional Commission (which coordinates regional planning and serves as the Area Agency on Aging for the 10-county greater Atlanta area) conducted a survey of 1,200 seniors. It found that respondents were less interested in traditional services such as Meals on Wheels than they were in fostering a strong sense of community. At the same time, the Fulton County Office on Aging was trying to figure out how to better utilize its Bowden senior center in East Point, a lower-middle class, African-American community that is located near Atlanta's international airport. With help from the Jewish Federation for Greater Atlanta, the ARC reached out to politicians, nonprofits and community groups in East Point. A local advocacy group spent six weeks canvassing NORC neighborhoods, assessing needs and mapping neighborhood resources. Public safety, transportation and home repair emerged as priorities.

The responses to these perceived needs were creative. Working with a neighborhood advisory council, for instance, the Atlanta Regional Commission (which served as the lead agency) organized a "fashion show" in which police, firefighters, water and electricity meter readers and even FedEx delivery drivers walked down a catwalk in the senior center in order to show seniors the types of people who might legitimately come onto their properties. A total of six NORCs are now up and running around Georgia.



JOHN BUNTIN

What do seniors really want? That's the question Fredda Vladeck set out to answer.

An even more ambitious statewide effort is taking place in Indiana. In June 2007, Steve Smith, then the state director of aging, hired the University of Indianapolis Center for Aging and Community to develop a request for proposals for several NORC pilot programs.

The Indiana initiative was born of the recognition that as Indianans aged, a growing number needed help to stay in their homes. The state's CHOICE home health care program was underfunded and had long waiting lists. As a result, many seniors who, with appropriate support, might have been able to maintain their independence, were being forced into institutional facilities. The pyramid of services the state offered its seniors was, in effect, upside down. The state reoriented its dollars away from institutional care and toward community-based services, but that wasn't enough.

In tackling its RFP assignment, the University of Indianapolis did something unusual. It sought to develop a picture of the overall needs of state seniors by fielding the AdvantAge Initiative telephone survey, which assesses seniors' well-being by ask-

ing questions about their health status (have they had a flu shot? when was their last mammogram?) as well as their access to local services. The results of the statewide survey were eye-opening. A lot of respondents weren't sure where to go for services. The prevalence of illnesses such as diabetes were very high compared to the nation as a whole.

Ultimately, five NORC pilot programs were selected, with locations ranging from urban Gary to suburban Indianapolis to rural Linton. Each NORC chose its "banner issue" to target. In Linton, for instance, the focus has been on mobility. The NORC has modified homes to remove hazards, created a walking program and continues to provide transportation vouchers (and volunteer drivers).

Indiana's five NORCs are currently in their second year of operation. State officials are waiting for an evaluation before seeking to expand further.

Despite their rapid spread in recent years, NORCs as a program struggle with the fundamental question of sustainability. "We can't do it without government," says UJC's Goldberg of the effort to build a national NORC infrastructure. And yet not everyone agrees that the future of NORCs is as a governmental program. Madison's NORC, Supporting Active and Independent Lives, or SAIL, has taken a different approach. Although it was started with seed money from a federal demonstration grant, it has sought to organize itself as a fee-supported membership organization. The goal, says Michael Hunt, is "that over time it will become financially independent so we don't have to rely on city and state subsidies."

But it's more than philosophy that drives Hunt to his conclusion. He also stresses numerical reality. "We can't count on government to support this population," he says. "There's not enough money and too many people."

Nonetheless, SAIL's approach has been controversial in the NORC world. "If you charge by membership, you are encouraging people not to participate," warns Vladeck. Although SAIL has a lower-cost membership rate for low-income seniors, Vladeck and other program-oriented NORC supporters worry that SAIL's approach is too close to what is sometimes called a "concierge model."

The best-known example of that is Boston's Beacon Hill Village. Established in 2003, it provides a range of programs to seniors throughout central Boston—from weekly grocery shopping to house cleaning to help getting on the Internet. Although subsidized memberships are available for low-income seniors, most members pay an annual membership fee of \$850 per household. That segregation of services by income worries Vladeck and other NORC advocates. They want to weave the programs and culture that support aging in place into the core of existing communities. That's a goal both Vladeck and Hunt support. They just differ on the most realistic way to get there.

"From a public policy viewpoint," Vladeck says, "it's clear we need to figure out what to do to make these communities good places to grow old." **G**

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Appendix

Characteristics of New York City's NORC-SSPs

Name (Year Founded)	Type of Housing	Number of Buildings	Number of Units
Bronx			
Amalgamated/Park Reservoir NORC (1995)	Moderate income co-op	14	1,800
Co-op City Senior Services Program (1995)	Moderate income co-op	35*	15,372
Parkchester Enhancement Program (1999)	Moderate income condo and rental	171	12,200
Pelham Parkway NORC (1999)	Public housing rental	23	1,350
Brooklyn			
Sheepshead/Nostrand Supportive Services (1999)	Public housing rental	34	2,204
Spring Creek Senior Partners (1999)	Low and moderate income rental	46	5,881
Trump Outreach Program (1995)	Moderate income co-op	3	1,672
Trump for Us (1999)	Moderate income co-op	2	2,800
Warbasse Cares for Seniors (1992)	Moderate income co-op	5	2,585
Manhattan			
Co-op Village Senior Care (1992)	Moderate income co-op	25	4,450
Knickerbocker Village Senior Services (1999)	Moderate income rental	12	1,600
Lincoln-Amsterdam Senior Care (1999)	Public housing rental and moderate income co-op	15	1,440
Lincoln House Outreach (1999)	Moderate income co-op	1	420
Morningside Retirement and Health Services (1986)	Moderate income co-op	6	982
Penn South Program for Seniors (1986)	Moderate income co-op	10	2,820
Phipps Plaza West NORC (1999)	Low, moderate, and market rate rental	12	1,610
Stanley M. Isaacs Neighborhood Center (1995)	Public housing rental	5	1,164
Vladeck Cares NORC (1992)	Public housing rental	27	1,500
West Side NORC (1999)	Moderate income co-op	3	566
Queens			
Big Six Towers NORC (1996)	Moderate income co-op	7	981
Clearview Assistance Program (1996)	Moderate income co-op	82	1,788
Deepdale Cares (1999)	Moderate income co-op	69	1,396
Forest Hills Co-op NORC (1999)	Public housing co-op	3	429
Northridge/Brulene/Southridge NORC (1999)	Moderate income co-op	31	1,938
Queensview/N. Queensview NORC (1996)	Moderate income co-op	21	1,090
Ravenswood RISE (1999)	Public housing rental	31	2,167
Ridgewood Gardens NORC (1999)	Moderate income co-op	4	372
Rochdale Village (1999)	Moderate income co-op	20	5,600

* Plus 236 two-family townhouses

Note: Table reflects NORC-SSP-provided data as of June 30, 2003.

Total Population	Senior Population	Annual Operating Budget	Housing Contribution
5,000	900	\$265,662	\$25,000
50,000	8,500	\$670,801	\$185,000
30,000	4,300	\$343,414	\$52,414
2,534	791	\$288,856	Exempt
5,145	900	\$274,858	Exempt
14,000	2,700	\$416,409	\$108,409
5,270	2,740	\$356,726	\$25,000
7,000	2,240	\$323,446	\$25,000
5,500	2,100	\$465,219	\$100,000
8,455	4,060	\$742,680	\$99,100
3,720	1,055	NA	\$25,000
3,190	804	\$571,856	Exempt
516	276	\$159,694	\$7,500
1,700	700	\$459,702	\$50,000
5,000	2,500	\$721,311	\$125,000
2,565	558	\$256,365	\$44,615
2,288	678	\$253,906	Exempt
3,000	860	\$274,952	Exempt
903	475	\$207,300	\$30,000
1,779	897	\$265,957	\$28,000
5,364	1,797	\$245,000	\$35,000
4,187	634	\$262,000	\$25,000
850	289	\$190,500	Exempt
5,000	2,400	\$148,000	\$20,000
2,900	1,600	\$301,614	\$32,000
4,532	1,000	\$198,341	Exempt
780	170	\$31,500	0
25,000	1,844	\$258,000	\$50,000

Appendix: Characteristics of New York City's NORC-SSPs (continued)

Name	Lead Agency	Health Partner
Bronx		
Amalgamated/Park Reservoir NORC	Bronx Jewish Community Council, Inc.	Jewish Home and Hospital Lifecare System
Co-op City Senior Services Program	Gloria Wise Boys & Girls Club	Visiting Nurse Service of New York; Montefiore Medical Center
Parkchester Enhancement Program	Beth Abraham Health Services	Beth Abraham Health Services
Pelham Parkway NORC	Bronx Jewish Community Council, Inc.	Jewish Home and Hospital Lifecare System
Brooklyn		
Sheepshead/Nostrand Supportive Services	Builders for the Family and Youth	Visiting Nurse Service of New York
Spring Creek Senior Partners	Jewish Association for Services for the Aged	Kingsbrook Jewish Medical Center
Trump Outreach Program	Jewish Association for Services for the Aged	Visiting Nurse Service of New York
Trump for Us	Jewish Association for Services for the Aged	Visiting Nurse Service of New York
Warbase Cares for Seniors	Jewish Association for Services for the Aged	Visiting Nurse Service of New York
Manhattan		
Co-op Village Senior Care	Educational Alliance	Continuum Health Partners/Beth Israel Medical Center; Visiting Nurse Service of New York
Knickerbocker Village Senior Services	Hamilton-Madison Houses	Cabrini Center for Nursing and Rehabilitation; Visiting Nurse Service of New York
Lincoln-Amsterdam Senior Care	Lincoln Square Neighborhood Center	Continuum Health Partners/Roosevelt Hospital
Lincoln House Outreach	DOROT	Continuum Health Partners/Roosevelt Hospital
Morningside Retirement and Health Services	Morningside Retirement and Health Services	Visiting Nurse Service of New York; Continuum Health Partners/St. Luke's Hospital; Mount Sinai Medical Center
Penn South Program for Seniors	Selfhelp Community Services, Inc.	Jewish Home and Hospital Lifecare System; Visiting Nurse Service of New York
Phipps Plaza West NORC	Phipps Community Development Corp.	Jewish Home and Hospital Lifecare System
Stanley M. Isaacs Neighborhood Center	Stanley M. Isaacs Neighborhood Center	Visiting Nurse Service of New York
Vladeck Cares NORC	Henry Street Settlement	Visiting Nurse Service of New York
West Side NORC	Goddard Riverside Community Center	Visiting Nurse Service of New York
Queens		
Big Six Towers NORC	Selfhelp Community Services, Inc.	None
Clearview Assistance Program	Samuel Field YM&YWHHA	None
Deepdale Cares	Samuel Field YM&YWHHA	North Shore-Long Island Jewish Health System
Forest Hills Co-op NORC	Forest Hills Community House	Visiting Nurse Service of New York
Northridge/Brulene/Southridge NORC	Selfhelp Community Services, Inc.	None
Queensview/N. Queensview NORC	Selfhelp Community Services, Inc.	None
Ravenswood RISE	HANAC	Visiting Nurse Service of New York
Ridgewood Gardens NORC	Selfhelp Community Services, Inc.	None
Rochdale Village	Rochdale Social Services, Inc.	Visiting Nurse Service of New York

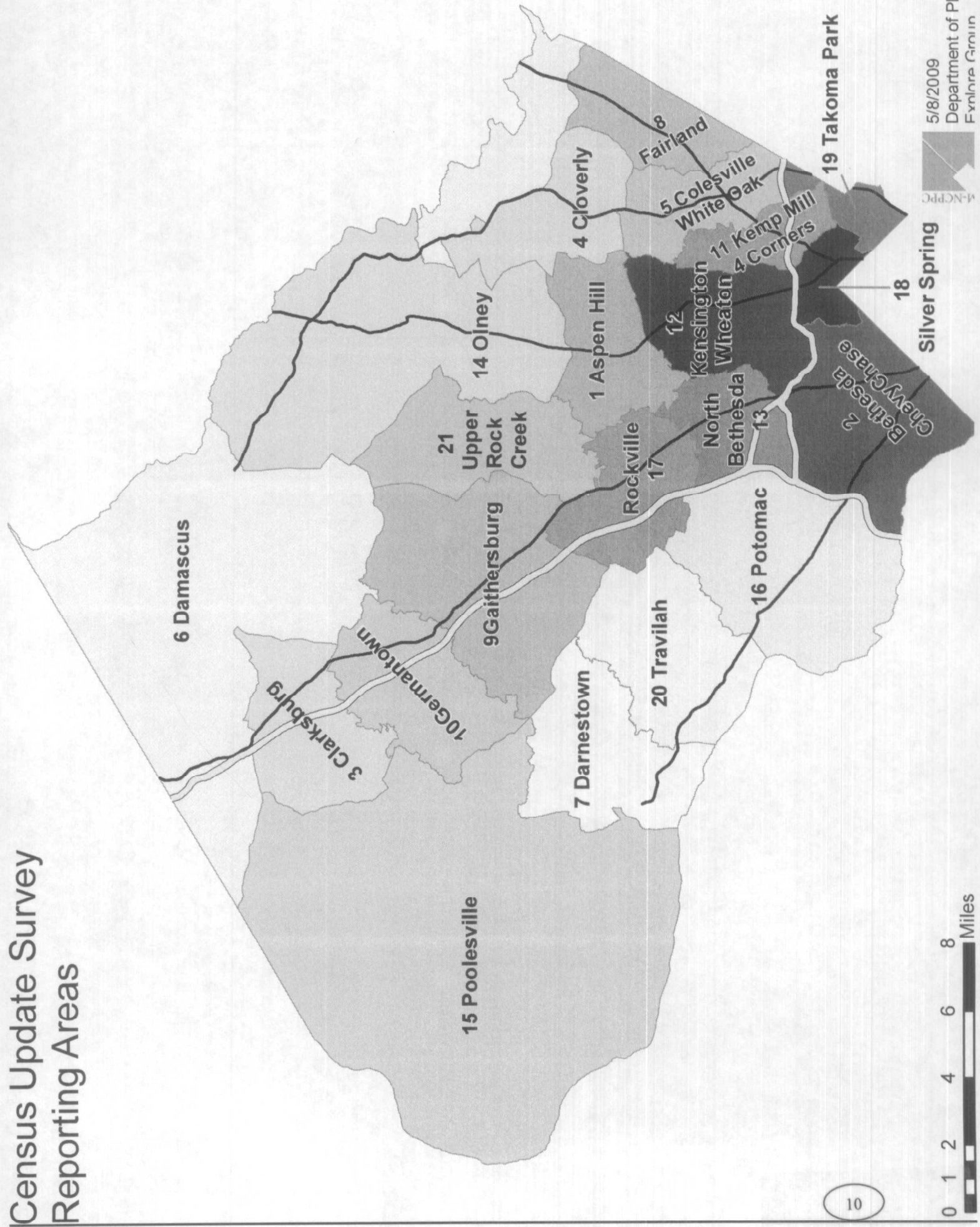
Note: Table reflects NORC-SSP-provided data as of June 30, 2003.

Nursing Hours	Social Work Staff	Special Features
18 hours	1.6 FTE	Coalition of two housing co-ops; education department for culture and activities since complex was built in 1938.
25 hours	5.45 FTE	Vast isolated complex. Social adult day program; numerous DFTA-funded traditional services including senior center.
37.5 hours	3 FTE	The only program with health care partner as lead agency.
1 FT	3 FT	NYCHA-funded senior center.
18 hours	3FT	DFTA-funded senior center.
1 FT	4FT	Private landlord initiated NORC program; isolated vast complex; program director employee of landlord.
10.5 hours	3.33FTE	
10.5 hours	3.33FTE	
14 hours	4 FTE	Social adult day program.
55 hours	7.6 FTE	Coalition of four different housing co-ops; the only program paying rent; social adult day program.
19 hours	2FT	Significant number of recently arrived Chinese elders.
1 FT	4.75FTE	Coalition between public housing and moderate income co-op; NYCHA contributes custodial care.
7 hours	1.71FTE	The only single-building NORC program.
1 FT	3FTE	Volunteer-led since 1966.
43.5 hours	6.77FTE	Original model program; social adult day program.
2 hours	2.43FTE	On-site activities funded by housing corporation prior to NORC program.
6 hours	3.83FTE	DFTA-funded senior center on site.
20 hours	4.5FTE	DFTA-funded senior center on site. Funded from 1992 to 1995 by HUD; thereafter by New York State.
6 hours	1.89FTE	Coalition of three different housing co-ops.
None	2FT	Community built space for program.
None	2FT	Garden apartment complex.
21 hours	2FT	Original residents founded the on-site YM-YWHA; garden apartment complex.
4 hours	2.8FTE	Only low-income public housing co-op in city; DFTA-funded senior center.
None	1.8FTE	Coalition of 6 co-ops; council-designated program.
None	2FT	Coalition of 2 co-ops.
	15.3FT	VNSNY's Community Nursing Org. program on-site from 1993 until NORC began; DFTA-funded senior center.
None	0.5FTE	Council-designated program; closed June 2003.
17.5 hours	3FT	Isolated part of Queens with higher than average concentration of African Americans.

OTHER VILLAGES IN THE UNITED STATES – SUMMARIZED FROM BEACON HILL VILLAGE’S WEBSITE

Village Name	Location	Website
California		
Avenidas Village	Palo Alto, CA	www.avenidas.org/village
San Francisco Village	San Francisco, CA	www.sfvillage.org
Tierrasanta Project	San Diego, CA	www.tierrasantaproject.org
Colorado		
Washington Park Cares	Denver, CO	www.washingtonparkcares.net/?p=1
Connecticut		
East Rock Village	New Haven, CT	www.eastrockvillage.org
Staying Put in New Canaan	New Canaan, CT	www.stayingputnc.org/index.html
District of Columbia		
Dupont Circle Village	Washington, DC	http://dupontcirclevillage.org/default.aspx
Kalorama Village	Washington, DC	www.kaloramavillage.org/Home.html
Northwest Neighbors Village	Washington, DC	www.nwnv.org
Palisades Village	Washington, DC	www.palisadesvillage.org
Florida		
Coral Gables @ Home	Coral Gables, FL	www.gablesfoundation.org/gablesathome.php
Illinois		
Lincoln Park Village	Chicago, IL	lincolnparkvillage.org/cms/1/blog
Indiana		
60-Plus Club	Noblesville, IN	www.60-plusclub.org/home5.htm
Maryland		
Home Ports, Inc.	Chestertown, MD	www.homeports.org/index.htm
Massachusetts		
Cambridge at Home	Cambridge, MA	www.cambridgeathome.org
Neighborhood Falmouth	Falmouth, MA	www.neighborhoodfalmouth.org
Newton At Home	Newton, MA	www.newtonathome.org
Vineyard Village	Vineyard Haven, MA	www.vineyardvillage.org/indexie.html
Minnesota		
River Bluffs Village	St. Paul, MN	www.riverbluffsvillage.org
New York		
Gramatan Village	Bronxville, NY	www.Gramatanvillage.org
Pennsylvania		
Crozer-Keystone Village	Springfield, PA	ckvillage.crozer.org/index.htm
Lancaster Downtowners	Lancaster, PA	www.lancasterdowntowners.org
Penn’s Village	Philadelphia, PA	www.pennsvillage.org
SNaP	Fayetteville, PA	www.snapn.org/index.php
Tennessee		
One Call Club for Seniors	Knoxville, TN	www.knoxseniors.org/onecall
Virginia		
Clifton Fairfax Station Transition in Place Services	Clifton, VA	www.cfs-tips.org
Mount Vernon at Home	Alexandria, VA	www.mountvernonathome.org/AboutUs.asp
Wisconsin		
Supporting Active Independent Lives	Madison, WI	www.sailtoday.org

Census Update Survey Reporting Areas



February 2008

FACT SHEET ON BURNING TREE AGING PROJECT

This fact sheet provides the background and current status of the Burning Tree Aging Project as of early 2008. The project's purposes are to facilitate "aging in place" for residents of our neighborhood, to explore how effectively such a project can be implemented in our suburban setting, and to provide a model for other neighborhoods that wish to undertake similar initiatives and, possibly, to partner with our project.

Motivation for the Burning Tree Aging Project.

For homeowners living in the suburbs, there comes a time when the burdens of home maintenance, transportation, shopping, meal preparation, and medical care outweigh the benefit of having one's own home. At that time one looks for alternative living choices, including facilities that provide needed services. While such facilities are numerous in the Washington, DC, area in a variety of configurations, some are very costly. In the past there have been few alternatives that allow seniors to remain in their homes as long as possible while still obtaining required services. However, about two years ago the American Association of Retired People (AARP) newsletter described a community-based project in the Boston area called "Beacon Hill Village."¹ That project was designed to facilitate "aging in place," or helping seniors remain in their homes rather than moving to an assisted living situation. The article interested Odile Jennings and Jane Coe, two of our neighborhood activists who, in 2006, undertook a simple survey to see if the seniors in our neighborhood had similar needs and desires to those in the Boston neighborhood. Not surprisingly, they found strong similarities. Many of our seniors intend to remain in the neighborhood as long as possible, and might be interested in an organization that could make it easier for them to age in place.

Background Information on the Beacon Hill Village Project.

Beacon Hill Village is a non-profit organization designed to help members age in place. A pioneering project, it has stimulated interest in forming similar organizations throughout the Nation. In the DC area, we are aware that there is such an organization on Capitol Hill which went into operation this past fall, and one in the Watergate. Another is in the Palisades neighborhood just north of Georgetown, and one was recently organized in Friendship Heights. These so-called "villages" tend to be non-profits whose members pay about \$1,000-\$2,000 per year and, in return, receive the names of vendors who provide discounted services and who have been vetted to assure that they provide high quality services. These villages may be aligned with hospitals that provide wellness programs (i.e. fitness, blood pressure monitoring, seminars on health, diabetes screening, etc.), and may also serve as focal points for social activities. Some of the villages receive grants and donations to help defray costs and reduce membership fees. A unique aspect of these organizations is that they are not government initiated, but rather "grass-roots" responses to the real needs of their aging populations. All have a strong volunteer component.

¹ "Declaration of Independents," AARP Bulletin, December 2005, pp. 14-17.

The Beacon Hill Village project demonstrated that there is great interest in such initiatives, and indicated what services and costs are feasible. As measured by reported renewal rates, Beacon Hill has been successful. On the other hand, it has also highlighted some issues of financial viability. Costs of setting up and maintaining the infrastructure of such an organization have to be carefully evaluated against income stability and adequacy. Additional background information on aging in place may be found in several articles²

The Nature of Our Neighborhood.

Although our needs may be similar, in various ways we live in a neighborhood that is different from Beacon Hill. We are in suburban Bethesda, inside the Beltway just off River Road. Our immediate neighborhood has about 440 households, and, according to estimates based on the 2000 census, about 1250 persons of whom 21 percent or 270 are aged 65 years and over. Most of these seniors are living with families, but some are living alone. Several additional aspects of our neighborhood are noteworthy. We have no focal point or community center for social interaction other than our local elementary school. We have a diverse neighborhood that is ethnically mixed with families from many countries. We are made of many young families and retirees. We have a mix of houses, many built in the 1950s when the neighborhood was developed, others more recently or newly built. We are truly suburban – the area is not in walking distance of downtown Bethesda or of any store, and we are relatively affluent. We have a neighborhood directory of our residents that maintains contact information. Since 2004 a weekly electronic newsletter has been distributed free of charge to a substantial number of community residents.

Community leaders are willing to devote themselves to making the community more neighborly, safe, and supportive. We are highly encouraged by the interest Montgomery County has shown in providing services to the county's senior population, and in demonstrating a particular interest in our project. County Executive Isaiah Leggett has made services to seniors, specifically aging in place, a priority. We believe our project is highly consistent with these County goals and policy objectives.

Initial Steps in Organizing Our "Village."

Some community members organized our first meeting in 2007 through the neighborhood electronic newsletter. At that meeting we found that about a dozen community members were willing to devote their time and energy to organize a village in our neighborhood. These people formed our "steering committee". We have no formal organization as of early 2008, although as a non-profit, we will ultimately have to elect officers and implement fiduciary functions. Among our initial tasks is the establishment of a non-profit corporation and the achievement of charitable organization status, known as a 501(c) (3) status, from the U.S. Internal Revenue Service. With 501(c) (3) status, we will be able to solicit funds through grants and partner with other organizations such as health care providers. Because many of us have never had experience establishing and

² "Aging at Home," New York Times, February 9, 2006; "A Grass-Roots Effort to Grow Old at Home," New York Times, August 14, 2007.

operating such entities, we are “learning by doing,” using public library and Internet resources. We have also identified a lawyer who will review our documents pro bono prior to submission.

During the past year we have had almost monthly meetings in the homes of steering committee members to address issues related to developing our organization. One initial goal was to assess the neighborhood’s residents and needs. To meet this goal, we conducted a demographic analysis of the neighborhood in April 2007, based on the 2000 Census of Population. We followed this analysis with a household survey of the neighborhood’s needs and resources. Developing and implementing that survey was facilitated by the Montgomery County Office of Aging and Disability Services, which reproduced and mailed our survey in early November 2007.

Results of Our Survey

After a follow-up effort in December 2007, the survey response was 21 percent, which was sufficient to do a meaningful analysis separately for the population under 65 and those 65 years old and over. The survey revealed that an estimated 84 percent of our seniors (households with persons 65 years old and over) want to remain in their home, and only 5 percent report that they plan to move to a senior residence; almost half the older respondents are uncertain as yet whether they will move to a senior residence or remain in their own homes. Two-thirds of the neighborhood’s seniors have family members nearby to help. The types of help these seniors need include home maintenance, housekeeping, snow and leaf removal, gardening, bill paying and tax preparation, and transportation to medical appointments.

Our neighborhood and presumably many others are characterized by a high degree of voluntarism – the desire to help others. One of the most encouraging results of our survey was that almost half our households (48 percent) are willing to help other neighbors. The services most frequently volunteered by these neighbors were friendly visiting, grocery shopping assistance and transportation, telephone check-ins, and transportation to medical appointments and non-medical destinations.

Services We Hope to Provide.

First and foremost, our “village” will serve residents of our neighborhood who wish to remain in their homes and with their families. Although our initial focus is on seniors, it is our intention to make services available to anyone in need because we anticipate that such services would also be of value to the disabled and disadvantaged in our neighborhood. We would like to provide access to professional care such as health aides and other personal services as well as wellness and health programs. In developing this array of services, we hope to partner with other organizations such as nearby hospitals that provide services to seniors such as blood pressure testing, seminars, and even trips. If demand is high enough and the capabilities can be developed, we would also like to organize social events and establish a community center or focal point for holding these events.

Second, the organization will provide an opportunity for our neighbors, both young and old, to provide volunteer services to our seniors. At a minimum, we hope to connect neighbors who can volunteer their services with those who need and request assistance. A hoped-for aspect of our village is to train volunteers to deal effectively and compassionately with neighbors requesting assistance. An information sheet will be provided to service recipients clarifying the legitimate expectations of our volunteers. In preparing both the volunteers and the recipients of the goals, expectations, and limitations of the services, we hope the entire neighborhood will benefit from smoother operations, mutual support and consideration of one another, and a greater sense of neighborliness.

Progress We Have Made and Challenges We Face.

Among their functions, villages can be “referral” organizations that identify discounted and vetted vendors, or instead they can contract with one of the commercial organizations already in existence for that purpose. At our most recent meeting we decided that, at least initially, we would seek out a company that coordinates high quality, discounted and comprehensive services. This approach would free us to focus our resources on planning and implementing volunteer services, health and wellness programs, and social interaction.

A major challenge has been developing a 501(c) (3) organization that complies with IRS requirements for non-profit corporations. Because members of the steering committee are not experienced in developing the required Article of Incorporation and By-Laws of a non-profit corporation, we have consulted a number of resources, some on the Internet and some from public libraries to develop initial documents and familiarize ourselves with key issues. Developing the necessary documents for this purpose is a complicated task that has consumed hours of effort, but we are making progress. Overall, establishing the organization requires patience, cooperation among our members, and a willingness to learn along the way.

Another challenge has been reaching consensus on clear goals and the means to accomplish them. In January 2008 we achieved consensus on a long-range plan that embodies our goals and the way in which we hope to achieve them. The plan has five phases: conception, organization, implementation, evaluation, and operation. During the conceptual phase we address key issues associated with goals, services, infrastructure, costs, and scope; during the organization phase we establish the information and relationships necessary to function effectively; during the implementation phase we describe the sequential tasks necessary to perform our mission; during the evaluation phase we define and implement the tasks necessary to assess how well we are meeting our goals, and communicate qualitative and quantitative accomplishment to our community, our county, and our funders; and during the operational phase, we continue and possibly expand the activities of a fully-developed and successful organization.

One future challenge we anticipate is the development of a financially viable business model. The Beacon Hill model was extremely ambitious and, as a consequence, ran into financial problems more than once. We want to avoid such problems. Another future challenge will be addressing how our Village can operate in a suburban setting where

neighbors live at some distance from one another and there is currently no nearby location other than the elementary school where neighbors can meet together.

Willingness to Provide a Model for Other Neighborhoods.

Neighborhoods differ considerably in their composition and resources. The approach that our neighborhood takes may not be entirely transferable to another neighborhood.

Nevertheless, we believe that some issues and experiences are common to any neighborhood wishing to establish a grass-roots organization to help its seniors. We are therefore willing to share our knowledge, survey, demographic analysis, and general approach with other neighborhoods. Ultimately, we may also be willing to share some of the experience we have gained developing a legal framework, but we are not far enough along in that process as yet.

Questions about the Burning Tree Village Aging Project may be directed by email to HarryMRosenberg@aol.com, LeslieKessler@gmail.com, and jimodile@verizon.net.

February 2008

LONG-RANGE PLAN: BURNING TREE AGING PROJECT

Introduction

The Steering Committee of the Burning Tree Aging Project developed the “Long-Range Plan” for several purposes:

- To establish consensus on our goals and to spell out the necessary steps to implement an aging-in-place initiative in our neighborhood. We believe that a shared vision is important for moving the project forward and is essential should any of us wish to represent the project to others both inside and outside our neighborhood
- To have a document that we can share with others including potential partners, Montgomery County government, and other neighborhoods who may want to promote aging in place either in partnership with us or independently
- As a basis for seeking funds

In a meeting of our steering committee on January 13, 2008, we achieved consensus on a preliminary version of a long-range plan. This is a refinement and elaboration of that plan.

The Long-Range Plan is divided into five phases: conceptual, organizational, implementation, evaluation, and operational. The conceptual phase addresses key issues that need to be resolved with respect to the nature of our organization; the organization phase spells out a number of tasks that we can begin addressing now; the implementation phase describes the sequential steps necessary for us to accomplish our mission, first as a field test, and then operationally; and the evaluation phase will enable us to determine, qualitatively and quantitatively, if we are accomplishing our goals. The operational phase is the continuing functioning of a fully-developed and successful organization.

Conceptual Phase

1. **Consensus on Our Goals.** In our January 13 meeting, we agreed that we want to facilitate aging in place in our neighborhood, that is, enabling seniors to remain in their homes as long as possible. That means helping them get maintenance services, transportation, health and wellness services, and social activities. To accomplish this, we agreed that we need a way of linking needs and resources, that is, an organizational mechanism through which neighbors can communicate their needs, and through which resources – volunteer neighbors or other sources – can be directly linked with the requestors. That mechanism is our aging-in-place project.

2. **Consensus on How Services Are Provided.** A variety of models are being developed across the Nation and within the Washington area to provide neighborhood-based services to persons wishing to age in place. One major issue is how to provide those services that cannot be provided effectively by volunteers. The approach used by Beacon Hill Village is to establish relationships with certain vendors (e.g. plumbers, electricians, etc.) who agree to provide high quality services at discounts. Another version is to partner with a commercial organization that has already established such relationships with vendors. The latter has the obvious advantage of an available capability that we would not have to “re-invent.” In our January meeting, the steering committee voted to establish such a partnership with one of several organizations in the Washington area that provide such services. We have to interview the available organizations to determine which will best meet our needs. Having selected one, we may make the partnership conditional on their performance as measured by customer satisfaction. Further, if over the long-run, we find that the commercial services are unsatisfactory, we may develop such a capability on our own. However, initially, it makes sense to us to partner with a commercial organization. We do not need to establish this working partnership immediately. Rather, initially we may wish to concentrate on volunteer services, on health and wellness services, and on recreational services. In the meantime, we can interview the available commercial organizations to identify those will have the best fit with the Burning Tree Aging-in-Place Project.
3. **Consensus on Infrastructure.** Another issue that we faced regards infrastructure, that is, whether we want to be an entirely volunteer-based entity, or whether we want a paid employee who initially can serve as coordinator of volunteer services, and possibly expand their scope of responsibilities. In making a decision on infrastructure there were several considerations: in an entirely volunteer-based entity, we will need commitments from volunteers to provide telephone and email coverage. We need to be responsive. This coverage could be done by one or several persons, but it is a real commitment. By comparison, a paid employee or several constituting a full-time equivalent may be a more reliable alternative. Associated with a focal point, volunteer or paid, we need a physical space. Initially, a coordinator could work out of their home; but ultimately we want to find a church or civic organization that will volunteer space, or we shall have to rent the space. Alternatively, and very theoretically, we may be able to set up a virtual office on the web operating out of one’s home. Until we have operating revenue, we shall function with volunteers working out of their homes who can coordinate volunteer services. Initially, we will not aim for 24-7 coverage or even “full-time” work week, but rather publicize specific “open hours.”
4. **Costs.** How do we defray costs if we have a hired employee and rent? It is our estimate that we may be talking about around \$100,000 per year for compensation of a full-time equivalent and a space. Lower costs would be associated with a part-time position, working out of their home. We can start with volunteers working out of their home to test the feasibility of a system, but ultimately we will

want to make our demonstration project more permanent. That will require income. Among possible sources of income are membership fees, grants, and donations. Membership fees can be kept very modest if we get a demonstration grant, if we partner with other organizations who can contribute to our organization, and if we succeed in getting grants.

5. **Space.** Two kinds of space need to be considered: office space and a physical focal point. Initially, as a volunteer-based entity, we believe that we can coordinate volunteer services out of a home; ultimately, however, it is desirable to have a space to carry out office functions, to maintain files, to receive mail, and to conduct business. We believe that we may be able to get space in a nearby church that will charge modest rent. The second type of space is a facility where our members can interact socially and that is in walking distance or a short drive from members' homes. The only facility in our neighborhood is the local elementary school, a space that does not lend itself well as a focal point for social activities of our neighborhood seniors. Initially, again, we may be able to prevail on a nearby church. Ultimately, we would like to have a physical facility that is suitable to our business and social functions.
6. **Scope.** In general, we believe it is desirable to take an incremental approach, that is, to start small by emphasizing coordinated volunteer activities, especially transportation and friendly visiting, and also by promoting the capabilities of a commercial partner. If we manage those basic components effectively, then we can add to our scope health and wellness services, and social activities. By having an incremental strategy we will not bite off more than we can chew, as it were; we can see what works and what doesn't; and we can make adjustments along the way.

Organizational Phase

1. Develop 501(c)(3) documents: Articles of Incorporation and By-laws, and establish a non-profit corporation
2. Establish a name for the organization
3. Delineate the service area and establish the demographics
4. Analyze the results of the survey in terms of needs
5. From the survey, list the volunteers and their skills
6. Develop a training plan and training materials for volunteers.
7. Develop a welcome letter and an information sheet for service recipients clarifying the legitimate expectations from the volunteers. For example, we prefer that requests for further services from a recipient be addressed to the call center rather than to the volunteer who provided earlier services.
8. Develop guidelines for volunteer coordinator
9. Design forms for volunteers to complete for each request for services, and its disposition
10. Develop criteria for evaluating service providers
11. Develop a budget

Implementation Phase

1. Conduct interviews with companies providing services
2. Select a company
3. Identify volunteer coordinators
4. Conduct training of volunteers
5. Field test our procedures using volunteers
6. Advertise our services to the neighborhood
7. Organize a committee for a neighborhood kick-off event
8. Have a kick-off social and solicit additional volunteers
9. Develop a demonstration proposal to County and others for financial assistance of operations
10. Partner with local hospitals for wellness services
11. Seek sponsor donors from local corporations
12. Locate office space
13. Hire coordinator
14. Continue training volunteers
15. Expand scope to social and recreational activities
16. Develop proposal to County and other for financial assistance to develop space for business and social activities

Evaluation Phase

1. Determine volume and nature of services requested and provided
2. Solicit feedback from our customers
3. Solicit feedback from coordinator
4. Report to Board, partners, and funders
5. Recommendations for changes in services

Operational Phase

1. Continuing services to our community
2. Continuing evaluation with reports to the Board, the County, and funders
3. Continuing fund raising
4. With funding, expand service hours

Revised

ESTABLISHING VILLAGES IN MONTGOMERY COUNTY:
A POSITION PAPER PREPARED FOR A MONTGOMERY COUNTY
GOVERNMENT MEETING ON AGING-IN-PLACE INITIATIVES,
JANUARY 21, 2009

Harry M. Rosenberg, Leslie Kessler, and Barbara Filner¹

Burning Tree Village in Bethesda, Maryland, became operational in the winter of 2008, when we responded to our first request for assistance, which was from an 81-year old neighbor who has a variety of needs including moving her trash cans on a regular basis, friendly visiting, and transportation to medical appointments when her children cannot drive her. Filling that simple request by neighborhood volunteers – through our “village” – represents the culmination of an organizing effort of almost two years. Based on our experience, this paper has four purposes: (1) to identify ways in which Montgomery County government can facilitate developing and maintaining villages such as ours that are designed to facilitate “aging in place,” (2) to describe what we consider to be essential conditions to establishing villages, (3) to present strategic issues that we believe need to be addressed in developing villages, and (4) to provide highlights of our own experience in developing Burning Tree Village. We believe that grass roots initiatives like ours, with Government encouragement and facilitation, can contribute to the quality of life of not only seniors but of all citizens in our County.

ROLE FOR MONTGOMERY COUNTY

Montgomery County government has been very supportive of our efforts to develop, implement, and promote the village concept. Initially, the Montgomery County Commission on Aging helped us field our survey of needs and resources. Since then, the

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Montgomery County Regional Services Center in Bethesda has provided our village with a grant (\$4,000) that helped us meet our logistic needs, and they continue to generously provide photocopying services. This has been an invaluable help.

Based on our experience over the past two years, we believe there are many opportunities for County government to promote the development of villages, including the following:

1. Provide technical assistance in developing questionnaires to establish need and to identify neighborhood volunteers, and helping disseminate the questionnaire.
2. Provide technical assistance in analysis of the survey.
3. Provide assistance with photocopying.
4. Provide start-up grants.
5. Provide legal technical assistance to establish non-profit organizations and to help develop documents to achieve tax-exempt status.
6. Provide workshops for problem solving and information exchange.
7. Provide technical assistance in developing software to maintain and update a data base on volunteer capabilities, volunteer assignments, requested services, and request dispositions.

The basis for these recommendations is described in the sections that follow.

ESSENTIAL CONDITIONS FOR ESTABLISHING VILLAGES

We believe that there are certain prerequisites to establishing villages. While government can and should play an important role, we believe that the major organizing and operational effort must be exerted at the grass roots level, that is, within the neighborhood or community. Consequently, we believe the following are essential ingredients to making villages happen in Montgomery County and elsewhere:

1. Leadership and commitment. From our experience over the past two years, we believe that it is essential to have a core of neighborhood leaders – an organizing committee if you will – who are willing to give time, energy, and effort to create a village.

2. Collect information about neighborhood resources. It is essential, we believe, to conduct a survey to find out who in the neighborhood is willing to volunteer services and what particular skills they have to offer.²
3. Communication mechanisms in the neighborhood. There has to be an effective way to communicate with neighbors. This can be by telephone or email, as well as using volunteers to distribute flyers. Information about telephone numbers and email addresses should be part of the neighborhood survey.
4. Strategic decisions. Strategic decisions have to be made on a number of issues among which one of the most important is how to link volunteers with those who request services. There are different ways in which this can be accomplished as discussed below.
5. Funds. Some funds are essential to operate the village. At a minimum, funds are necessary for photocopying, renting space for meetings, possibly for a telephone, and for legal filings if the village is to become incorporated, and, therefore, eligible for grants.
6. Liabilities. Liability issues can arise. Even when a kind-hearted neighbor helps another neighbor, something can go amiss. For example, there can be an accident in a car, in a home, or on the sidewalk. Volunteers and the village need to be cognizant that liability issues can arise.

These are the six considerations we believe are essential to get a village underway.

STRATEGIC DECISIONS

Initially, the steering committee of Burning Tree Village reviewed and discussed the experience of a number of village experiments, in particular Beacon Hill Village in Boston and Capitol Hill Village in the District of Columbia. Two aspects of these villages concerned us: one was the relatively high costs associated with having a paid executive director; the other was the relatively high annual membership fees, the two being inter-related. In the case of Beacon Hill Village, we knew that high costs had led to financial

² A copy of the survey form used by Burning Tree Village and results of our survey are available on request to the authors.

crises, and that high membership fees could be exclusionary in neighborhoods with a range of household incomes. Addressing and resolving these and other issues constituted our agenda for many months. Based on our experience, we have identified a number of issues or strategic decisions that are likely to confront any community that wishes to establish its own village.

The issues include the following:

- Management
- Membership fees
- Population Served
- Scope of services
- Pace of development
- Linking supply and demand
- Operating protocol
- Communications
- Promoting participation
- Fund raising
- Developing forms and guidelines
- Feedback, quality assessment, and record keeping
- Liability issues
- Technical assistance

Management. A crucial decision is whether to hire an executive director (on a part-time or full-time basis) or whether to take a different approach to managing the village. Some organizations, for example, are entirely volunteer-based. There are undoubtedly advantages to having an executive director. An executive director can continuously promote and sustain the mission and operations of the organization. In the case of Burning Tree Village, our steering committee felt that it would be premature to hire an executive director in the absence of information about the demand for services. Further, having a committed Board of Directors – a number of whom are retired – we felt that initially we could use our volunteers and Board to manage and operate the organization

without incurring the liability of hiring and paying an executive director in the absence of a major, sustained income flow. We were determined to keep expenses down. And we were extremely fortunate to have the support of Montgomery County, which provided us not only with a grant for our first year of operations, but also with continuing photocopying services – a major expense during our start up.

Membership Fees. In contrast to Beacon Hill Village, we wanted to avoid having high membership fees. We wanted everyone in our community to be able to participate and for no one to be excluded based on ability to pay. By keeping expenses to a minimum, we felt that we could have anyone in our community join and decided to charge no membership fees and to rely on donations.

Population Served. The implication of “aging in place” is that the population to be served is the elderly. Nevertheless, we broadened the definition of the target population to include those with disabilities. We felt that this was consistent with our mission of helping neighbors and that it would not greatly stress our volunteer resources. Some other villages have broadened their target population to include the younger population, which has very different sets of needs such as baby-sitting.

Scope of Services. We envisioned our scope of services as consisting, ultimately, of the following components: (1) neighbor-to-neighbor assistance, (2) concierge services, that is, a single source of recommendations of vendors (such as plumbers, electricians, etc.) (3) medical component, (4) educational services, (5) and social services. Neighbor-to-neighbor assistance would draw on the strong spirit of volunteerism that our survey revealed. Concierge services are envisioned as initially at market prices, but ultimately at discounts. The medical component – possibly in partnership with a hospital – would consist of wellness services (such as blood pressure testing), possibly health aides at a reduced cost through a preferred provider, and possibly gerontological services. Educational services would include seminars on such relevant topics as home modification and reverse mortgages. Social services could include socials, neighborhood walks, coffees, organized trips, etc. In defining our scope of services, we ruled out providing emergency services for which there are other available mechanisms such as the local Rescue Squad and the police.

Pace of Development. Because of our decision to rely on Board members rather than hiring an executive director, our pace of development has been slow, deliberate, and incremental; we have concentrated on developing and implementing one component at a time beginning with neighbor-to-neighbor assistance. We also implemented a quasi-concierge component: instead of having a single telephone number at which we would identify for the caller the name of a reliable vendor, we distribute to our community an annual printed list of recommended vendors based on the experience of neighbors and friends (this is called “Neighborhood Services Exchange: Services Recommendations, Winter 2008.”) Further, we agreed that we would initially delimit our service area to our immediate neighborhood, even though we had expressions of interest from outside.

Linking Supply and Demand. A key decision in implementing a village is how to link volunteers with those requesting services. Our research revealed a number of alternative approaches. Thus, Beacon Hill Village and Capitol Hill Village have staff who match volunteers against requests for assistance and links requesters with preferred service providers. Alternatively, in Montgomery County, a local charitable organization named Bethesda Help, which provides services to a low income population, uses volunteers and an answering service to respond to requests without paid staff.

A third alternative, which Burning Tree Village chose as an initial approach, is to partner with another organization that links volunteers with those in need. In Montgomery County such an organization is The Senior Connection, which focuses in particular on providing transportation. The Senior Connection agreed to partner with Burning Tree Village as a clearinghouse for at least some services, and has generously provided training to our volunteers and those of Bannockburn (a nearby neighborhood). Burning Tree Village has adapted training materials developed by The Senior Connection for its volunteers. To reciprocate, some Burning Tree Village volunteer drivers have agreed to help provide transportation services to an assisted living facility near our neighborhood, through the Senior Connection clearinghouse.

Operating Protocol. The way Burning Tree Village meets the needs of our neighbors is as follows: Both those volunteering their services and those requesting services are encouraged to contact any member of the Board of Directors, who provides the requestor

with the appropriate form. The information on the form is entered into the Burning Tree Village data base and also is faxed to The Senior Connection. Those requesting services are given the phone number of The Senior Connection and are told to call The Senior Connection in advance to request a particular service. If the requested service is not within the scope of services provided through The Senior Connection, The Senior Connection refers the request back to our President, who assigns the request to one of our volunteers. After service is provided, we ask that the requester and the volunteer provide us with feedback.

Communication and Publicity. To develop the organization as well as reach out to the neighborhood, good communication is essential. Burning Tree Village does this through several means including email, a weekly neighborhood electronic newsletter, and house-to-house flyers. In addition, in September 2008, we held a “launch” presentation to 60 residents of the area in a meeting room rented from a nearby house of worship, followed by a launch presentation to 20 additional residents at the home of our President. One of our members has developed a fledgling website that describes our organization, and is being upgraded to provide a number of functionalities, including links to forms and to County resources.³

Promoting Participation. Promoting Burning Tree Village in the neighborhood and in the broader Bethesda community is an on-going effort. It requires publicity material as well as outreach to organizations in the community such as the Chamber of Commerce. In November 2008, we did house-to-house leafleting. In addition, beginning November 2008, we initiated small social gatherings on a block-by-block basis. At these social gatherings, we have at least one member of the Board who makes a brief presentation and responds to questions. We have had about a dozen of these block gatherings to date. At the September launch and the November block socials, forms were made available to join the village, to make donations, to volunteer, and to register for services.

Fund Raising. Fund raising will become an integral part of our activities. It is encouraged through our brochure (Appendix I) and our website www.BurningTreeVillage.org

³ Richard Fong, Cyberix Web Services. Email: Webmaster@Cyberix.us

Because of our low expenses and the generosity of Montgomery County, as well as donations by our members, we are financially viable. Nevertheless, we shall emphasize fund raising as an on-going effort through our Board and a committee to which we shall assign that responsibility.

Developing Forms and Guidelines. We have developed three forms: (1) Join Burning Tree Village, (2) Volunteer, (3) Register for Services. In addition, working with the Senior Connection we have developed a set of guidelines for volunteers that meets the requirements of the Senior Connection and yet takes into account the special characteristics of the “village” context.

Feedback, Quality Assessment and Record Keeping. We consider it essential to ascertain how well services are being performed. Accordingly, we intend to contact our service requesters a week about after they have received services to get feedback. We also request monthly reports on services provided by our volunteers. This information will be part of the public record, and will appear in our annual report. Feedback from our neighbors also informs our continuing efforts to improve our operating protocol and the quality of our services.

Liability Considerations. Helping one’s neighbor seems innocuous enough, a humanitarian effort. However, liability issues can arise. For example, in the unlikely event that the recipient of services falls during transfer into an automobile, or is injured while under the assistance of a volunteer, there is a potential for a law suit. Two protections exist for volunteers in Burning Tree Village: (1) Maryland has “good Samaritan” laws that are favorable to volunteers and would provide, ultimately, some protection. (2) The Senior Connection, with which Burning Tree Village is partnered, provides its volunteers with liability insurance. We have been told by The Senior Connection that to date (from 1968), they have in fact never had to invoke their insurance.

Technical Assistance. Burning Tree Village, as a matter of principle, believes that as the first “village” in Montgomery County it should share its experience and promote the village concept. Accordingly, we provide technical assistance to any neighborhood or individual that asks for assistance in organizing a village. We have responded to about a dozen of such requests and have made about half a dozen presentations to a number of

communities including the Bannockburn community, the Bannockburn Civic Association, Fleming Park, Fallsmeade, Somerset, and Carderock Springs.

ADDITIONAL CONSIDERATIONS

Timeliness. Developing and implementing a village takes time. It may require many meetings for a steering committee and, later, a Board to achieve consensus on the best approach to take. There are many strategic decisions to make. In addition, going through the legal process of establishing a corporation and achieving tax exempt status is not only time-consuming, but requires a collaborative relationship with an attorney who can, with a clear understanding of the village mission, help develop legal documents that articulate the goals of the organization and help avoid pitfalls that might hinder incorporation and tax-exempt status.

Web-based Utilities. We believe that the Internet can greatly facilitate the creation and operation of villages by putting the volunteer data base on-line to make and track assignments. Burning Tree Village is working with a web designer, who is helping develop a system that builds on the spreadsheets that we now use to maintain our records of volunteers and those who request help.⁴

Meeting Space. It is helpful to have a meeting space for not only monthly or bimonthly meetings of the village steering committee or Board, but also for social and educational events. For our Board meetings, we meet in Board members' homes, often on a rotational basis. For larger neighborhood meetings, to date we have rented space at a nearby house of worship. Many neighborhoods like our own do not have a common space other than the public schools, which are available for a modest fee and with some lead time.

Supply and Demand. We were encouraged by the results of our survey which showed a high level of volunteerism in our neighborhood. However, we have been disappointed by the low level of requests for assistance. This is not for want of publicizing Burning Tree Village. On the contrary, we have publicized our aging-in-place initiative widely, first, with our survey a year ago. Since then, we have publicized with house-to-house flyers, and currently with block-by-block hosted gatherings. We have asked ourselves why our

⁴ Ibid.

residents, some of whom have obvious physical infirmities and no longer are able to drive, are not asking for assistance with greater frequency. We conjecture that there may be a number of reasons: (1) In the absence of a village, many residents have made other arrangements to meet their needs such as calling on children, friends, or immediate neighbors. (2) Some residents can afford to hire others to meet their needs for transportation and other services. (3) As we live in a culture of “self-reliance,” our neighbors may be reluctant to ask for help. They may be unwilling to get others involved in their life affairs. They may prefer privacy, even at the cost of social isolation. Our sense is that it will take some time before villages make inroads in our culture of self-reliance.

MAJOR STEPS IN ESTABLISHING BURNING TREE VILLAGE

Beacon Hill Village as an Inspiration. A seminal article in the AARP Bulletin appeared in December 2005. Entitled “Declaration of Independents,” the article described a social experiment in Boston called “Beacon Hill Village,” in which a group of seniors established an organization to help one another “age in place,” that is, remain in their homes as long as possible.⁵ The article ignited interest in many communities throughout the United States, where the growing population of seniors faced similar challenges to remaining in their homes as they aged and their strength and physical mobility declined. The article caught the attention of a number of residents in our neighborhood who hoped that we might initiate a similar effort. Other communities throughout the United States were also inspired by the Boston experiment, and soon were organizing similar initiatives as widely reported in the media.⁶ In the Washington area such efforts began to take shape in a number of neighborhoods including Capitol Hill, the Palisades neighborhood of

⁵ “Declaration of Independents,” AARP Bulletin, December 2005, pp. 14-17.

⁶ “Aging at Home,” New York Times, February 9, 2006.

www.nytimes.com/2006/02/09/garden/09care.html

“A Grass-Roots Effort to Grow Old at Home,” New York Times, August 14, 2007.

www.nytimes.com/2007/08/14/health/14aging.html

“Neighborhood Starts Program to Help Seniors,” Bethesda Gazette, July 23, 2008.

http://www.gazette.net/stories/072308/bethnew203252_32365.shtml

Georgetown, the Watergate apartment complex, Dupont Circle, Mount Vernon, and in the neighborhood near the Burning Tree Elementary School in Bethesda.

Many of these so-called village initiatives looked to Beacon Hill Village for not only inspiration, but also for guidance. Indeed, Beacon Hill Village capitalized on its visibility by developing a technical guide (available for several hundred dollars) and training seminars to help other communities establish their own villages. The Beacon Hill Village model is a non-profit membership organization. Its members pay about \$600 per year individually or \$850 per family. In return, they are provided with a variety of services including names of preferred vendors (e.g., electricians, plumbers) who provide discounted, quality services, hospitals that provide wellness programs, and activities that promote social interaction and learning. Beacon Hill Village partners with a major hospital in the Boston area; it accepts donations and grants to help defray costs and to subsidize membership for low income households. Important aspects of Beacon Hill Village are a strong volunteer component and a “grass roots” base.

One of the greatest contributions of Beacon Hill Village is to demonstrate the feasibility of these aging-in-place initiatives. As measured by renewal rates, Beacon Hill Village with a membership numbering about 85 percent has been successful. On the other hand, it has highlighted some issues of viability, in particular the cost of developing and maintaining the infrastructure of such organizations.

Beginning Burning Tree Village. For Burning Tree Village, the initial step was to assemble a group of interested neighbors who were willing to review and discuss the experience of different approaches drawing in particular on the experience of Beacon Hill Village and Capitol Hill Village. In the spring of 2007, about a dozen interested neighbors – many of whom belong to our local garden club – began discussing how to develop an aging-in-place effort for our neighborhood. We felt that a systematic survey of the neighborhood to determine interest was essential. We designed the survey⁷ and,

⁷ The survey form is available on request to the authors. One of our Board members – Allan Williams – played a major role in designing the form.

with the assistance of the Commission on Aging in Montgomery County, the survey was copied and mailed to our neighbors in November 2007. At the same time, we used information from the 2000 U.S. Census of Population to determine the demographic characteristics of our neighborhood.

We also began our efforts to establish ourselves as a non-profit corporation in the State of Maryland and to request designation from the U.S. Internal Revenue Service (IRS) as a 501(c)(3) organization, so that donations would be tax deductible, and so that we would qualify to apply for grants from government and foundations. To address these complex legal matters, we were fortunate to obtain the pro bono services of an attorney in our neighborhood with special expertise in non-profit law.⁸ That attorney, working closely with one of our Board members,⁹ helped us develop Articles of Incorporation, By-Laws, and the IRS application for tax-exempt status. We were incorporated in April 2008 with the State of Maryland, and, in November 2008, applied to the IRS for tax-exempt status.

Our steering committee, meeting at least monthly, also discussed what to name our organization. Our preference was Burning Tree Village; “Burning Tree” because the local elementary school, Burning Tree Elementary School, is a focal point of our community, and “Village” to link our efforts with the burgeoning national aging-in-place movement. After research, we found that the name “Burning Tree Village” was not in the list of corporations in Maryland. In addition, using the Internet, we found that the name was used by a real estate developer in Oregon, and in Maryland. We contacted both organizations to secure assurance that they would not challenge our use of the name “Burning Tree Village.”

Results of the Demographic Analysis. Burning Tree Village is comprised of 440 households near a local elementary school – the Burning Tree Elementary School, which is the only definable community focal point. The neighborhood has no active civic

⁸ Spirer Law Firm, P.C., Bethesda, Maryland 20814. <http://www.spirerlaw.com>

⁹ Board member Barbara Filner chaired the committee that discussed issues associated with incorporation and served as the Board liaison with Julian Spirer of the Spirer Law Firm.

association. It does have other institutions that provide some community identity and cohesiveness in addition to the school, namely a garden club, a Neighborhood Watch, a community electronic newsletter, and a community directory. The boundaries of our community are arbitrarily defined, but are compatible with the local election district. Economically, the community is mixed; it includes many brick homes built in the 1950's largely for commuters in the employment of the Federal government, as well as some considerably more expensive homes built since the early 1990's. The approximately 1,300 residents are a mix of younger families and older families. About 21 percent of the population is aged 65 years and older. A number of households with older residents are occupied by a single adult, often a widow. Only 10-percent of the households are non-white, mainly Asian. In terms of educational attainment, over half the adult residents have at least a bachelor's degree, about twice the national average. The average household income is three times the national average but about 10 percent of the households have an annual income of less than \$50,000, based on the 2000 U.S. Census. Our neighborhood is similar to other neighborhoods of Bethesda, which are characterized by excellent public schools and by their proximity to Washington, D.C.

Results of Neighborhood Survey. After a follow-up effort by telephone, the survey response was 21 percent, which was sufficient to do a meaningful analysis separately for the population over and under 65 years of age. The survey revealed that 84 percent of the households with seniors want to remain in their homes as long as possible, that two-thirds of the seniors have family members nearby to assist them, and that the types of help that the seniors would like include home maintenance, housekeeping, snow and leaf removal, gardening, assistance with bill paying and tax preparation, and transportation to medical appointments. (The survey form and the survey analysis are available by request to the authors.)

An important finding was that almost half (48 percent) of the respondents, regardless of age, are willing to help other neighbors. The services most frequently volunteered are friendly visiting, grocery shopping, transportation to medical appointments, and telephone check-ins.

CONCLUSION

Based on our activities over the past two years, we are convinced of both the merit and the feasibility of having “villages” in suburban settings such as those that abound in Montgomery County. We believe, further, that the demand for services will increase as neighbors hear about positive experiences, and gain confidence in the volunteer resources that neighbors can and wish to provide. We believe that Montgomery County government can and should offer technical and financial assistance to encourage development of villages.

APPENDIX I. BROCHURE FOR BURNING TREE VILLAGE



"Neighbors Helping Neighbors Age in Place"

Become part of Burning Tree Village, a new nonprofit organization for our neighborhood to help our senior and disabled neighbors age in place. Burning Tree Village is nondenominational and open to all neighbors, regardless of age. There are no fees or dues. It is based on the concept of neighbor helping neighbor.

- Become a volunteer
- Receive supportive services that will help you stay in your home as you age
- Participate in social and other community-based activities.

Mission

Burning Tree Village (BTV) helps neighbors remain in their homes as they age ("age in place"). We do this through volunteer activities and through partnerships with other organizations that will complement our volunteer activities. By engaging all residents in these activities, BTV enhances the quality of life of the entire community.

Planned Activities

Most will be provided by volunteers at no cost:

- ❖ Transportation (to medical appointments, shopping, cultural events, etc.)
- ❖ Grocery and other shopping
- ❖ Friendly visiting
- ❖ Information on resources provided by Montgomery County, nonprofit organizations, social service organizations
- ❖ Light home-based chores (changing light bulbs, setting clocks, hanging pictures, etc.)
- ❖ Social and educational events
- ❖ Annual paper copy of the publication *"Neighborhood Services Exchange: Recommended Services"*
- ❖ Weekly electronic neighborhood newsletter *"Neighborhood Services Exchange"* and occasional *"Neighborhood Watch Updates"*

Additional benefits planned for the future

- ❖ Hospital partnership(s) for wellness programs
- ❖ Facilitated access to a variety of professional services (home health care, home maintenance, etc.)
- ❖ Educational and social activities

Background

According to AARP statistics, nine out of ten Americans over the age of 50 want to stay in their homes as they age. That desire, along with the difficulty of tasks such as home repair and driving, has led to the formation of "aging in place" communities in which neighbors help one another stay more safely in their homes by sharing their abilities. Neighbors in our community began developing Burning Tree Village in 2007, and we were incorporated as a nonprofit in April 2008.

We plan initially to focus on volunteer activities, and gradually to expand our services through partnerships with hospitals and other organizations. There are no fees for joining or receiving

services. Contributions to help defray administrative expenses such as photocopying, postage, renting meeting space, accounting, etc. are appreciated.

Partnership with The Senior Connection

To serve as a clearinghouse for our volunteers, we are partnering with a nonprofit called "The Senior Connection," which has helped coordinate volunteer services in Montgomery County for many years. Senior Connection is funded in part by Montgomery County, by an interfaith consortium, and by donations. Senior Connection is helping us not only with volunteer coordination, including transportation coordination, but also with training volunteers and keeping records of services provided.

How to Request Services

To request services, please contact any of our Board members, listed below, and request a "Register for Services" form. The Board member will deliver the form, help you complete it (if you wish), and will ensure that the form is faxed to The Senior Connection, which will register you. Once registered, you may call Burning Tree Village c/o The Senior Connection to request a specific service, at tel. 301-962-0820.

BURNING TREE VILLAGE, Inc.

BOARD OF DIRECTORS

President, Leslie Kessler, Deep Creek Court, 301-526-2251
Vice President, Harry Rosenberg, Richard Drive, 301-229-4406
Secretary, Odile Jennings, Beech Tree Road, 301-229-5232
Treasurer, Amy Rider, Beech Tree Road, 301-365-0839
Nancy Aronson, Winterberry Place, 301-229-9239
Jane Meleney Coe, Pawtucket Road, 301-320-5083
Barbara Filner, Richard Drive, 301-229-9243
Anne Golightly, Winterberry Lane, 301-229-2646
Allan Williams, Beech Tree Road, 301-365-2317
Wendy Williams, Beech Tree Road, 301-365-2317

LEGAL COUNSEL

Julian Spirer, Esq.
Spirer Law Firm, P.C.
Bethesda, Maryland 20814
Tel. 301-654-3300
<http://www.spirerlaw.com/>

BURNING TREE VILLAGE, INC.

Email: BurningTreeVil@aol.com

Website: www.BurningTreeVillage.org

If you have any questions or suggestions, please contact one of the Board members.

Form to Join or for Additional Information

Please complete both sides of this request form, then tear off and mail:

☐ I would like to join BTV

Please send me more information on

☐ Volunteering with BTV

☐ Receiving services from BTV

Name (Title, First, Middle, Last)

Address

Bethesda, Maryland 20817

Home Phone _____

Cell Phone _____

Email _____

Date of Birth _____

Names of Other Household Residents Who Wish to Join:

(1) _____

(2) _____

(3) _____

Contributions

Burning Tree Village is free, because we do not want resource constraints to be a barrier to receiving services and participating. To sustain Burning Tree Village, we shall depend in large part on voluntary annual contribution to support administrative costs and underwrite social and informational events organized by BTV.

Suggested contributions are as follows:

- Good Neighbor ...Up to \$99
- Supporter...\$100-499
- Sustainer...\$500-999
- Founder...\$1,000 and over

If you wish to make a contribution, please write a check payable to Burning Tree Village, Inc. BTV is a nonprofit corporation and has applied with the IRS for status as a 501(c)(3) organization. Once we receive a favorable ruling by the IRS, donors will be notified and their contributions will be tax deductible to the extent allowed by law.

Amount Contributed _____

____ Check here if you wish your contribution to be anonymous in published listings.

Please mail this form with your contribution (if any) to
Burning Tree Village, Inc.
c/o Amy Rider
8404 Beech Tree Road
Bethesda, MD 20817

February 2008

AGING-IN-PLACE SURVEY RESULTS BURNING TREE AGING PROJECT

A survey was conducted in November 2007 to assess the needs and resources of the neighborhood with respect to aging in place. A copy of the survey is appended to this analysis of survey results.

Surveys were mailed to the 440 households listed in our 2006 Neighborhood Directory, which includes the area bounded by Beech Tree Road, River Road, Wilson Lane, and Maryknoll Avenue, plus off-shoots. By the November deadline, 78 had been returned.

A second mailing to all non-respondents was not feasible. Instead, a random 1 in 5 sample of non-respondents was identified, and follow-up phone calls were made to this group seeking to learn why they did not respond. In general, the people reached in the followup were interested in the aging-in-place concept, but they just had not gotten around to completing the survey. Quite a few offered to do so and were supplied new survey forms, and this helped increase the number of responses to 92 (21%).

Only a few of the non-respondents reached were enthusiastically uninterested. In a couple of cases, people said they thought the surveys were meant to be completed only by elderly people. Also, a few people had moved out of the area, so the true response rate is actually somewhat higher than 21%.

Surveys were sorted by household age, groupings based on the oldest person in the household. That is, if there was one person age 65-74 and one age 75-84, it was identified as a 75-84 household. In almost all cases, however, household occupants fell into the same age category. Part I data (wishing to stay in home, willingness to pay for services, etc.) are based on households; Part II data (willingness to help, etc) are based on people (one or two per household could respond). The age distribution of the survey respondents is shown in Table 1.

Table 1. Age Distribution of Survey Respondents

Age Groups	Households		Individuals	
	Number	Percent	Number	Percent
All ages	92	100.0	140	100.0
35-44 years	3	3.3	5	3.6
45-54	14	15.2	20	14.3
55-64	14	15.2	20	14.3
65-74	22	23.9	37	26.4
75-84	28	30.4	43	30.7
85 years and over	11	12.0	15	10.7

We can roughly approximate the demographics of our neighborhood, and it is apparent that older residents were more apt to respond. About two-thirds of the household respondents were aged 65 years old and over (Table 1), which compares with an estimated 20 percent of the population in our neighborhood based on census information. Note that for those rare households with a 65-74 and a 75-84 year-old resident, it is not possible to identify age of individual respondents, so they both remain in the older group; this biases the sample upward to a minor extent.

The main results are presented below by age group (less than 65 years, 65 years old and over) and for the total sample. There were 31 households in the less than 65 group, and 61 in the 65+ group, as shown in Tables 2 through 5, below.

Part I. Households

Table 2. Households That Hope to Remain in Home

	All Ages		Less than 65 Years		65 Years and Over	
	Number	Percent	Number	Percent	Number	Percent
Total	92	100.0	31	100.0	61	100.0
Yes	71	77.2	20	64.5	51	83.6
No	7	7.6	3	9.7	4	6.6
Not sure	13	14.1	8	25.8	5	8.2
No response	1	1.1	0	0.0	1	1.6

Results in Table 2 show that overall, over $\frac{3}{4}$ of the households hope to remain in their home (77 percent), and the proportion is somewhat higher for seniors, 84 percent. About 8 percent of the seniors' households were not sure whether they wanted to remain in their homes or not.

Table 3. Households That Plan to Move to a Senior Residence

	All Ages		Less than 65 Years		65 Years and Over	
	Number	Percent	Number	Percent	Number	Percent
Total	92	100.0	31	100.0	61	100.0
Yes	5	5.4	2	6.5	3	4.9
No	38	41.3	11	35.5	27	44.3
Not sure	48	52.2	18	58.1	30	49.2
No response	1	1.1	0	0.0	1	1.6

In Table 3, for households in which the respondent was 65 years old and over, only 5 percent indicated that they intend eventually to move into a seniors' residence. However, almost half the respondents in this age group are not sure.

Table 4. Households That Have Family Around to Assist

	All Ages		Less than 65 Years		65 Years and Over	
	Number	Percent	Number	Percent	Number	Percent
Total	92	100.0	31	100.0	61	100.0
Yes	55	59.8	15	48.4	40	65.6
No	34	37.0	14	45.2	20	32.8
No response	3	3.3	2	6.5	1	1.6

Over half (60 percent) of the households in our neighborhood have relatives around who can assist. Among seniors, the proportion is even higher, two out of three (Table 4).

Table 5. Households That Are Willing to Pay for Services

	All Ages		Less than 65 Years		65 Years and Over	
	Number	Percent	Number	Percent	Number	Percent
Total	92	100.0	31	100.0	61	100.0
Yes	36	39.1	12	38.7	24	39.3
No	6	6.5	1	3.2	5	8.2
Depends on cost	46	50.0	16	51.6	30	49.2
Other or no response	4	4.3	2	6.5	2	3.3

Table 5 shows that about 4 out of 10 senior households are willing to pay for services that enable them to age in place, but that almost half (49 percent) are concerned about costs.

Part II. Individuals

Table 6. Individuals That Are Willing to Help Neighbors

	All Ages		Less than 65 Years		65 Years and Over	
	Number	Percent	Number	Percent	Number	Percent
Total	140	100.0	95	100.0	45	100.0
Yes	67	47.9	44	46.3	23	51.1
No	24	17.1	18	18.9	6	13.3
Not sure	39	27.9	25	26.3	14	31.1
No response	10	7.1	8	8.4	2	4.4

A large number of persons living in our neighborhood are willing to help their neighbors (Table 6). Almost half the respondents (48 percent) responded affirmatively to the survey with respect to wanting to help their neighbors. The proportion is about the same for seniors as for those under 65 years.

Table 7. Individuals That Area Willing to Help Develop the Organization

	All Ages		Less than 65 Years		65 Years and Over	
	Number	Percent	Number	Percent	Number	Percent
Total	140	100.0	45	100.0	95	100.0
Yes	33	23.6	16	35.6	17	17.9
No	54	38.6	18	40.0	36	37.9
Not sure	32	22.9	9	20.0	23	24.2
No response	21	15.0	2	4.4	19	20.0

We asked whether individuals in our neighborhood are willing to help develop the organization that would assist our neighbors to age in place (Table 7). Over one-third of those under 65 indicated their interest (36 percent), and about one in five seniors (18 percent) expressed such a willingness. We are encouraged that we have a potential cadre of neighbors who can help us implement our initiative. An additional 23 percent indicated that they are not sure, and therefore expand the potential pool of helpers.

Table 8. Individuals That Want to Be Kept Informed

	All Ages		Less than 65 Years		65 Years and Over	
	Number	Percent	Number	Percent	Number	Percent
Total	140	100.0	45	100.0	95	100.0
Yes	86	61.4	27	60.0	59	62.1
No	0	0.0	0	0.0	0	0.0
No response	54	38.6	18	40.0	36	37.9

Well over half the respondents (61 percent) wish to be kept informed about efforts in our neighborhood to facilitate aging in place (Table 8).

Respondents were presented with a list of 24 types of help and asked to indicate those they now use and anticipate using (Which do you use now? Which do you pay for? Are there ones you now get gratis? What services do you anticipate needing in the next five years?). In particular, the question concerning anticipated types of help needed in the next five years was intended to tap into potential demand for services in our neighborhood that commercial coordinators of services might provide. Responses to this question were tallied. Unfortunately, this provides an incomplete picture of future needs. For example, many respondents concentrated on the first column (services now used) but skipped the others, although it is not logical that services now used would not be needed in the next five years. Of the 31 families in the less than 65 group, 12 (39%) indicated they would need one or more types of help in the next five years; 33 of the 61 families in the 65+ group (54%) said so. The most frequently checked items were home maintenance (31 households); housekeeping (28), snow/leaf removal (28), gardening/lawn mowing (26), transportation to medical appointments (15), and bill paying or tax preparation assistance (14). These were the leading items in both age groups.

The 67 people who indicated willingness to help their neighbors were asked which of the 24 types of help they would provide. Quite a few people did not indicate types of help. Of those who specified types, the leaders were friendly visiting (32), grocery shopping assistance (26), grocery shopping transportation (26), telephone check-ins (25), transportation to medical appointments (22), transportation to non-medical destinations (18). Note that except for transportation to medical appointments, there is no overlap with the list of types of services most frequently needed in the next five years.

Questions about the survey methodology and analysis may be directed to Allan Williams at email awilliams@ihs.org or to Leslie Kessler at email lesliekessler@gmail.com

BURNING TREE NEIGHBORHOOD AGING PROJECT

INSTRUCTIONS: Please complete one survey for your entire household.

PART I – What you might want from the neighborhood

Do you hope to remain in your home as you get older (retirement age)?

☐ Yes ☐ No ☐ Not sure

Do you plan to move into a senior residence when you are older

☐ Yes ☐ No ☐ Not sure

Do you have family living in the area who might assist you?

☐ No ☐ Siblings ☐ Adult children ☐ Other close family

Place a check mark for a 'YES' answer to the following questions.		Do you now use any of the following services?	Do you now purchase this service?	Do you now receive unpaid assistance (from family, friend, public, etc.) to receive this service?	Do you anticipate needing this service in the next 5 years?
1	Transportation to medical appointments				
2	Transportation to or assistance with non-medical destinations (shops, bank, visiting hair salon, movies, etc.)				
3a	Grocery shopping: transportation				
3b	Grocery shopping: someone to shop for you				
4	Snow removal/leaf removal				
5	Gardening/lawn mowing				
6	Meal preparation in your home				
7	Meal delivery				
8	Bathing/showering				
9	Medication reminders				
10	Emergency response system (e.g., Lifeline)				
11	Telephone check-ins				
12	Housekeeping				
13	Laundry				
14	Bill paying or tax preparation assistance				
15	Home maintenance (painter, electrician, handyman etc.)				
16	Home modification/adaptation for safety or accessibility				
17	Friendly visiting				
18	Social activities (classes, clubs, dinners, teas, etc.)				
19	Help with your computer				
20	Pet care				
21	Plant care (indoor)				
22	Trash take out/return trash cans				
23	Other				

It is presumed the new organization, acting on behalf of a large number of neighbors, will be able to negotiate discounted, yet quality services. If it meant being able to remain in your own home as you age, would you be willing to pay membership fees to enable the new organization to refer you to these services?

☐ Yes ☐ No ☐ Depends on cost

Please indicate the number of people in your household in each age category:

15-24 ____ 25-34 ____ 35-44 ____ 45-54 ____ 55-64 ____ 65-74 ____ 75-84 ____ 85 + ____

BURNING TREE NEIGHBORHOOD AGING PROJECT

PART II — What might you offer the neighborhood?

To maintain confidentiality, your survey responses will be separated for tabulation from the following identifying information.

Space is provided for answers from two persons. If your household needs more space to volunteer, please add information on the reverse side of this form. Please print as legibly as possible.

PERSON 1

A1. Would you be willing and able to assist with or offer any of the services listed in the chart in Part I to a neighbor in need?

☐ Yes ☐ No ☐ Not sure

Please look at the list in Part I, including your additions to 'Other.' Which might you be willing to assist with or offer? Please write the number or name:

B1. Would you like to help develop the organization?

☐ Yes ☐ No ☐ Not sure

PLEASE TELL US WHO YOU ARE SO WE MAY BE IN TOUCH WITH YOU.

Name

Address

BETHESDA, MARYLAND 20817

Phone

Email

C1. ☐ Would you like to be informed of any progress or developments with this project? Please check this box to give permission to add your contact information to our contact list or directory.

PERSON 2

A2. Would you be willing and able to assist with or offer any of the services listed in the chart in Part I to a neighbor in need?

☐ Yes ☐ No ☐ Not sure

Please look at the list in Part I, including your additions to 'Other.' Which might you be willing to assist with or offer? Please write the number or name:

B2. Would you like to help develop the organization?

☐ Yes ☐ No ☐ Not sure

PLEASE TELL US WHO YOU ARE SO WE MAY BE IN TOUCH WITH YOU.

Name

Address

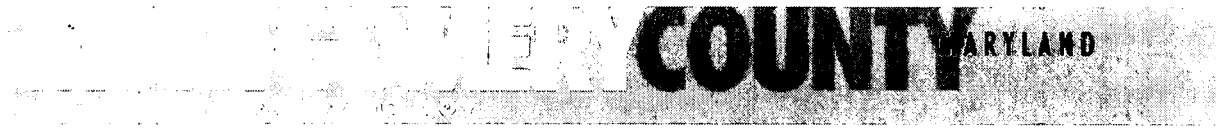
BETHESDA, MARYLAND 20817

Phone

Email

C2. ☐ Would you like to be informed of any progress or developments with this project? Please check this box to give permission to add your contact information to our contact list or directory.

THANK YOU for taking the time to participate. A summary of the results will be available in the near future. Your individual responses will remain confidential.



Senior Site - Senior Summit - Executive Summary



Executive Summary County Executive Leggett's Senior Summit

Introduction

Preparatory work for the Senior Summit included two strategic planning processes conducted in collaboration with outside consultants. Phase I (completed in May 2007) was a report titled *Imagining an Aging Future for Montgomery County, Maryland*, developed by Towson University Center for Productive Aging. Phase II (completed October 2007), titled *Senior Outreach Strategic Communications Report*, was developed by Reingold, Inc. Both reports found "widespread satisfaction among seniors and their caregivers with the programs and services the County provides" (Reingold, 2007). However, both reports underscored the need to (1) improve both internal and external communication about the range of available services to seniors and caregivers; and (2) establish a mechanism for improving coordination and collaboration among County departments and with private partners responsible for delivering senior services.

In light of the findings of these reports and the awareness that the senior population is projected to nearly double between 2000 and 2030, County Executive Leggett convened department directors for a day long retreat on May 14, 2008 to focus on how Montgomery County Government, in partnership with private providers and the faith community, can promote vital aging for all its seniors. On this date, he also established the Senior Sub-cabinet on Vital Aging and directed that a Senior Summit be convened in November 2008. The purpose of the summit would be to identify priority issues affecting the senior population, develop strategies and action plans to meet current and future needs, and take the first steps towards developing collaborative relationships between County departments and community stakeholders to ensure that Montgomery County is a good place for older adults to live and retire.

Process

Pre-Summit

Under the leadership of the Senior Sub-cabinet on Vital Aging, preparations for the Senior Summit began in June 2008. White Papers on critical issues were developed modeled after the national *Blueprint for Action: Developing a Livable Community for All Ages*, a joint product of the National

Association of Area Agencies on Aging and Partners for Livable Communities with funding from the MetLife Foundation. The eight topic areas addressed were: Health and Wellness, Housing and Zoning, Home and Community Supports, Civic and Social Engagement, Transportation, Safety, Employment, and Communication and Outreach. Pre-summit work groups comprised of public and private stakeholders were convened on each of these eight topics to brainstorm and prioritize recommendations. The result of this process was that the work groups developed a total of 188 unique recommendations, with 87 of them collapsed by participants into 28 broad recommendations for further discussion and prioritization at the Summit.

Summit

The actual Senior Summit was a daylong event held on November 20, 2009, on the University of Maryland at Shady Grove campus attended by nearly 300 stakeholders. County Executive Leggett devoted his entire day to attending the Summit, sharing his vision of the County as it relates to senior issues and learning from other participants. County Council members George Leventhal and Roger Berliner spoke on behalf of the County Council, and U.S. Senator Barbara Mikulski had a staff member speak on her behalf. The invited luncheon speaker was Sandy Markwood, Chief Executive Officer, National Association of area Agencies on Aging; whose presentation was titled, The Maturing of Montgomery County: How The County Can Prepare to Effectively Meet the Needs of its Aging Population.

Participants at the Summit prioritized the 28 recommendations by popular vote, then broke up into work groups to brainstorm action steps that could help the County achieve the goals of the recommendations. This process produced 177 different potential action steps for further consideration.

Post-Summit

In order to move forward with a coherent and organized implementation plan, the Senior Sub-Cabinet tasked the Consolidation and Feasibility Task Force to review all the Summit and Pre-Summit materials and submit a list of consolidated and integrated recommended action steps that are feasible and realistic.

The Task Force in reviewing the materials found that the actions steps produced at the Summit were in reality a mixture of: action steps, principles and additional recommendations. Given the mandate to identify specific and concrete implementation steps, the Task Force went through the material item by item to collapse them into discrete action steps. As a result of this process the 177 recommendations emerging from the Summit were initially consolidated into 123 discrete action steps.

As part of the review process it also became apparent that the work produced by participants in the Summit and Pre-Summit process represented an integrated mixture of two intimately related concepts: 1) goals and outcomes related to improved quality of life for the senior population, and 2) processes and actions that enable those goals and outcomes to be achieved. It was deemed essential to take both factors into consideration because goals without steps to achieve them were insubstantial, and actions without goals were a recipe for inefficiency. Through this process the 177 Summit recommendations, which were consolidated into 123 action steps, were further distilled into 46 potential action items; with the awareness that many of these items were applicable across multiple goals. For example, "investigate best practices and determine if they can be applied in County" was a single action bullet but it could reasonably be applied to each of the substantial outcome categories developed.

The final step undertaken by the Task Force was to look for cross cutting initiatives that were feasible given current constrained resources that would allow for realization of the principle goals while addressing the issue of sub-optimal collaboration among County departments. Upon review, nine major potential initiatives emerged from the mass of recommendations. These nine initiatives, along with the major recommendations of each of the topical workgroups are submitted as part of this final report.

Principles

It is important to note that aside from the discrete recommendations and action steps, the Senior Summit process elicited a number of consistent principles or themes that should be inherent in any steps taken by the County. The major principles identified were:

- **Diversity:** Any actions must be sensitive to the diversity of the senior population. The senior population (regardless of whether defined as age 60+ or age 65+) is extremely diverse, with diversity to be understood not merely in terms of race and ethnicity, but also along the lines of language, disability, age, income and resources.
- **Partnerships:** County government cannot and should not expect to do this work alone. In order to achieve the goals and outcomes stated, the County must have the active involvement of its private sector partners (non-profits, business community, faith communities, etc.) and residents.
- **Civic Engagement:** The skills, time, and wisdom of older adults represents one of the growing renewable resources available to our communities. Given the projected increase in needs for some of our most vulnerable residents, and the constraints on public dollars, many of the proposed efforts will require volunteer commitments in order to create a stronger and more responsive community.

- **Planning:** In order to optimize the effectiveness and efficiency of services the County must make every effort to identify and implement evidence based and best practices.
- **Accountability:** Mechanisms must be in place to ensure that action steps are implemented and progress toward goal attainment measured. Implicit in these recommendations is that actions are inter-departmental in nature; hence some centralized oversight process must be in place to ensure that actions do not “fall between the cracks.”

March 2009

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SENIOR SUMMMIT FOLLOW-UP ACTION STEPS

TRANSPORTATION

- **Current:**
 - Continue free Ride-On for seniors
 - Continue to support senior transportation initiative in collaboration with Jewish Council on Aging (JCA) Roundtable
 - Continue to support to Senior Connection, which provides transportation assistance to the senior population as well as assisting emerging village models
- **Short-Term:**
 - Work with Montgomery County Public Schools to increase use of service credits by high school students to assist seniors in utilizing the internet to identify transportation resources
 - Communication & outreach efforts including: what transportation options/resources exist,
 - Driver safety programs including adaptation and training
 - Research and planning: Study unmet and undermet needs, best and promising practices in other communities, and special needs of vulnerable and diverse populations
 - Change taxi regulations to allow for door-to-door service
- **Longer-Term**
 - Liability insurance for volunteers
 - Investigate feasibility of Independent Transportation Network (ITN) model in county
 - Support development of walkable communities

HEALTH & WELLNESS

- **Current**
 - Continue to support chronic disease self-management programs in collaboration with JCA
 - Continue to provide nutrition education classes through senior centers
 - Continue to support exercise and bone health programs (i.e., Bone Builders) for seniors
- **Short-Term**
 - Communication and outreach efforts to educate public about various heath topics, including; importance of exercise, proper nutrition, normal aging process, health benefits of volunteerism, etc
 - Research and Planning: investigate best and promising practices that can be applied to Montgomery County
 - Community Health Improvement Process (CHIP) to assess and monitor health status of residents
 - Collaborate with community partners to provide and expand multi-component exercise programs as well as fall prevention programs

- Encourage development of “shared care” models that support neighbors help neighbors(aging in place), utilizing community and seniors centers, senior web site, faith based groups)
- Longer-Term
 - Computer access and training via senior and community centers

HOME AND COMMUNITY BASED SUPPORTS

- Current
 - Continue support for home delivered meals and groceries
 - Continue support to existing village models in county
- Short-Term
 - Collaborate with partners, such as Montgomery College, to support development of workforce training programs to increase supply of workers that provide essential services to seniors
 - Research and Planning: investigate best and promising practices that can be applied to Montgomery County
 - Communication and outreach efforts to educate public about issues that can help them remain in community
- Longer-Term
 - Enhance supportive services such as chore, personal care, and home modifications
 - Increase funding for adult day service and respite care
 - Investigate the possibility of creating a service credit model where people can accrue credits by providing assistance to others that they can use for themselves or family members

HOUSING

- Current
 - Continue and expand Neighbors helping neighbors initiative
- Short-Term
 - Research and Planning: investigate best and promising practices that can be applied to Montgomery County, as well as identify naturally occurring retirement communities (NORCs)
 - Communication and Outreach efforts to educate public about various housing options, “right sizing”, services available in community to assist with goal of Aging in Community, planning to mitigate future problems
 - Provide village concept in other communities, with County taking a leadership role
- Longer-Term
 - Expand opportunities for assisting living to moderate and low income seniors, including those with mental illness
 - Revise tax policies (such as property taxes and fees) to reduce impact on seniors and give incentives to those providing services to vulnerable seniors
 - Modify zoning regulations to favor walkable communities
 - Work with United States Postal Service to have mail carriers check on seniors that are most vulnerable

CIVIC AND SOCIAL ENGAGEMENT

- Current
 - Continue to support inter-generational programs
 - Continue to support the Ambassador Outreach program to help recruit older adults, and enhance use of senior centers and other resources
 - Continue to support congregate meal programs that bring together seniors in a social setting for meals; including the wide range of ethnic meal sites
 - Continue to provide wide range of programming and activities at senior centers
- Short-Term
 - Expand Pro Bono program
 - Research and Planning: investigate best and promising practices that can be applied to Montgomery County
 - Communication and Outreach efforts to educate seniors about the multiple benefits of volunteerism, including the importance of social connectivity to quality of life; as well as the wide range of activities currently available in the community
- Longer-Term
 - Tax credits to seniors for volunteer work in high priority community activities
 - Computer access and training via senior and community centers

EMPLOYMENT

- Current
 - Continue support for successful job fair for seniors
 - Continue workshops provided by Commission for Women
 - Continue workforce development programs
 - Continue the senior fellows program
- Short-Term
 - Participate in statewide Policy Academy process that is addressing older adult employment issues, and implement recommendations in County
 - Collaborate with partners, such as Montgomery College, to support development of workforce training programs to increase supply of workers that provide essential services to seniors
 - Research and Planning: investigate best and promising practices that can be applied to Montgomery County
- Longer-Term
 - Provide transition training (work to retirement) for seniors contemplating leaving the workforce
 - Recognize and award local businesses and organizations that engage in senior friendly employment practices
 - Promote trainings to help seniors better prepare for the current job market-strategies to provide equitable and rewarding employment opportunities for seniors

SAFETY

- **Current**
 - Continue to implement recommendations of Pedestrian Safety and Fire Safety task forces
 - Continue to support efforts by partners to provide supports to caregivers, as well as identifying and returning to their families individuals with dementia who wander away
- **Short-Term**
 - Develop and implement fall risk and fall prevention programs
 - Research and Planning: investigate best and promising practices that can be applied to Montgomery County
 - Communication and Outreach efforts to educate public about range of safety issues
- **Longer-Term**
 - Consumer protection initiative to reduce financial exploitation of seniors

COMMUNICATION & OUTREACH

- **Current**
 - Maintain and enhance new senior website as single source of information
- **Short-Term**
 - Establish work group to identify range of methods to effectively provide information to senior (examples include: newspaper inserts, speakers bureau, ads on Ride-On buses, radio ads, ethnic media)
 - Establish a single point of entry for seniors attempting to communicate with the County (for example the upcoming 3-1-1 initiative)
 - Have libraries set aside special space for senior information
- **Longer-Term**
 - Cross market and cross train across all departments/services
 - Partner with healthcare providers to systematically disseminate information to seniors and caregivers

March 2009



Bethesda Chevy Chase Regional Services Center

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Villages Meeting - January 21, 2009

Attendees: Margit Meissner, Carderock Springs Citizens Association; Edith Miles Bannockburn Citizens Association; Joan Urban, Town of Chevy Chase; Helen Pelikan, Bannockburn's Neighbors Assisting Neighbors Program; Charles Kauffman, Aging in Place Strategy; Captain Betsy Davis and Captain Nancy Demme, Montgomery County Police; Robette Gooding, Suburban Hospital; Ruth Skolnick and Signe Wetrogan, Stonegate Citizens Association; Gwen Haney, East County Regional Services Center; Elizabeth Boehner, Health and Human Services; Sam Korper, Commission on Health; Miriam Kelty, Bannockburn Neighbors Assisting Neighbors; Austin Heman, Office of Community Partnership; Elin Haaga and Birgit Anderlan, Fleming Park Community Association; Harry Rosenberg, Leslie Kessler and Anne Golightly, Burning Tree Village; Ilaya Hopkins, East Bethesda Community Association; Jesse Etelson and Nancy Carter, Fallsmead Homes; Char Resnick and Claire Wernstedt-Lynch, Congressman Crhis Van Hollen's Office; Barbara Zeughauser and Phyllis Wiesenfelder, Helping Hands - Town of Somerset; Joe Hainey-Gonzalez, Department of Human Resources; Rev. Tim Warner, Office of Community Partnerships; Eric Aldrette, LEDC; Marcia Pruzan, Montgomery County Commission on Aging; Mier Wolf, Office of Community Partnerships; Dwayne Jenkins, Silver Spring Regional Services Center; Lien Tran, MD Vietnamese Mutual Association; Hee-Kyoo Park and Jongsun Park, Korean-American Senior Citizens Association, Inc.; Karla Silvestre, Office of Community Partnerships; Cyrus Behrooz, Department of Technology Services; Marcy Drozdowicz, OASIS; Jim Marrinan, Fallsmead Homes Corporation; Lorraine Schack, Rockville Senior Services; Judith Welles, Cabin John; Lynette Conrad; Jennifer Renkeman and Leslie Rubin, Office of Legislative Oversight; Simin Rasolee, Department of Permitting Services; Carolyn Stilwell, Conflict Resolution Center of Montgomery County; Nguyen Minh Chau, Statewide Empowerment Zones for Seniors Commission; Elaine Binder, Commission on Aging; Beth Shapiro, Community Partners - Jewish Federation of Greater Washington; Odile Saddi, Health and Human Services; Natalie Cantor, Mid-County Regional Services Center; DeVance Walker, Department of Economic Development; Lori O'Brien, Office of

Management & Budget; Rachel Glass, Montgomery Coalition for Adult English Literacy (MCAEL); Jay Kenney, Health and Human Services; Jewru Bandeh, UpCounty Regional Services Center; Myriam Torrico, Housing and Community Affairs; Bruce Adams, Office of Community Partnerships; Eleanor Wallace, Community Use of Public Facilities; Catherine Matthews, UpCounty Regional Services Center; Roger Berliner, Montgomery County Councilmember; Gertrud Mergner, Takoma Park; Robert Tiller; Cindy Gibson, Office of Councilmember Berliner; Ken Reichard, US Senator Cardin's Office

Welcome

Kenneth Hartman, Director of the Bethesda-Chevy Chase Regional Services Center, welcomed the audience to the meeting. He explained the purpose of the meeting was to build upon priorities established in the County Executive's Senior Summit held in November, 2008. He said the meeting was an opportunity for communities to share information and brainstorm approaches to the challenges inherent in establishing a "Village" model.

Montgomery County Councilmember Roger Berliner (District 1 - Bethesda, Chevy Chase, North Bethesda, Potomac) welcomed those present. Mr. Berliner pointed out that many of the communities present were constituents of District 1. He said that supporting villages and aging-in-place was a top priority of his and that he looked forward to working to support the initiatives getting underway.

Nguyen Minh Chau, with the Maryland's Statewide Empowerment Zones Seniors Commission, spoke briefly about the Commission which was established last year to develop recommendations for an "Empowerment Zones for Seniors" program that directs financial and regulatory incentives to local communities that offer Aging-in-Place services and facilitate the personal independence, and civic and social engagement of seniors in the community.

Presentation

A presentation was given by the Burning Tree Village on the strategic challenges facing village initiatives.

Other communities spoke briefly on the status of their initiatives and challenges they faced.

Discussion

Challenges facing new Villages.

- Website Development
- Liability Insurance

- Volunteer coordination
- Meeting Space
- Leadership
- Survey Response
- Comfort in receiving services
- Safety & Security
- Economy
- Know limits of the initiative's capabilities
- Some do not wish to self identify as "seniors"
- Lacking "organic" nature of relationships - need to foster a spirit of community

Elements of a Successful Initiative

- Build Relationships between neighbors
 - Social interaction
 - Home visits
 - Individual outreach
 - Publicize resident profiles
 - organize Neighborhood Watch
- Include focus on helping seniors in neighborhood communications
- Require a nominal membership fee.

Potential Roles for Montgomery County in Support of Villages

- Technical assistance in developing questionnaires to establish need and to identify neighborhood volunteers, and helping disseminate the questionnaire.
 - Technical assistance in analysis of the survey.
 - Assistance with photocopying.
 - Start-up grants.
 - Legal technical assistance to establish non-profit organizations and to help develop documents to achieve tax-exempt status.
 - Workshops for problem solving and information exchange.
 - Technical assistance in developing software to maintain and update a data base on volunteer capabilities, volunteer assignments, requested services, and request dispositions.
 - Emergency preparedness training.
 - Connect students who need community service credits.
 - Open lines of communication with communities
 - Facilitate utilization of existing public/private infrastructure
 - Provide consumer information
-
- Legal resources - templates for by-laws, 501(c)3 filings, etc.

Next Steps

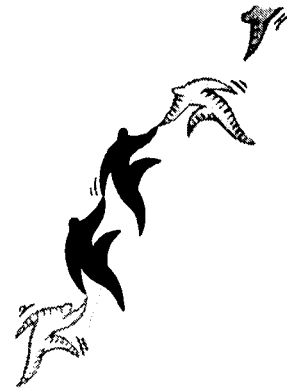
Communities agreed to meet quarterly to share their experiences. Mr. Hartman announced the Bethesda-Chevy Chase Regional Services Center would look at creating a "toolkit" or "guidebook" for communities interested in beginning a village initiative. The B-CC center would also establish a resource for villages on its website:
www.montgomerycountymd.gov/bcc.

Villages meeting (1/21/09) summary

- The primary role of the County is to facilitate access to and the utilization of existing public/private infrastructure and resources.
- HHS may be able to provide Villages limited technical assistance with survey analysis. They can contact Charles Smith at 240-777-1231 or Charles.Smith@montgomerycountymd.gov. The Pro Bono consultant program:
<http://www.montgomerycountymd.gov/mcgtmpl.asp?url=/content/volunteer/probono.asp> may also be a good resource for survey related work.
- RSC may provide photocopying of start-up brochures, surveys, and flyers during the initial organization period. This will not be provided on-going.
- RSC will no longer provide start-up grants, but will work with Villages to compile a list of public/private grant opportunities geared towards seniors and aging in place initiatives. The list will be posted on the Center's webpage. Ideally, Village members would contribute to this list.
- RSC will continue to update the *Villages Resource Exchange* on the Center's webpage. There was discussion about criteria for inclusion on the VRE, possibly only non-profits that provide services useful to an aging in place model. It may morph into a message board maintained by a Village consortium on which members post helpful resources they have identified as they develop their aging in place models. RSC will survey Villages members to determine what type of content would be useful.
- RSC will continue quarterly forums to provide time for roundtable problem solving and information exchange as well as a short (45 minutes) presentation on a topic of interest. The next forum will be scheduled for the end of April and will include a presentation on the *Neighborhoods Ready* project by the Volunteer Center and HHS. Other topics of interest include consumer information and accessing existing public/private resources.
- RSC will research pros and cons of becoming a non-profit and tax-exempt and identify resources for legal technical assistance for Villages interested in applying for 501(c)3 status. Only non-profit organizations can register with the Volunteer Center. A list of free

or low cost legal services for seniors was posted in the April Villages Resource Exchange. Some of these resources, including templates for by-laws, 501(c)3 filings, etc. are already available in the *Community Toolkit* and will be incorporated into the *Villages Toolkit* being developed.

- The Pro Bono consultant program may be a good resource for developing a software template that will allow Villages to maintain and update a database on volunteer capabilities, volunteer assignments, requested services, and request dispositions. A listing of several off-the-shelf volunteer management software programs that Villages can use was included in the April Villages Resource Exchange.
- There are many issues related to using students as volunteers. RSC will contact the MCPS Student Service Learning coordinator to learn more about considerations. This may be a good presentation for future quarterly forums.
- RSC is creating a “toolkit” or “guidebook” for communities interested in beginning a village initiative (*Villages Toolkit*). In addition to information already included in the *Community Toolkit*, it will include a section on surveying communities to identify needs, managing volunteers and other resources, including templates for by-laws, 501(c)3 filings, etc.
- RSC has added a Villages section to their webpage at www.montgomerycountymd.gov/bcc.
- It will be important as we move forward to broaden the model to accommodate neighborhoods with varying needs and populations.



Villages Resource Exchange

February 3, 2009

In an effort to support the many volunteers who are striving to make their neighborhoods a better place for all residents to live and thrive, we are piloting the **Villages Resource Exchange**. Organizations interested in reaching out to the Villages communities and those interested in the Villages model can submit a short description of available programs and services to Leslie Hamm at Leslie.Hamm@montgomerycountymd.gov or call 240-777-8207. The Villages Resource Exchange will be posted online under "Partners" at: <http://www.montgomerycountymd.gov/bcctmpl.asp?url=/content/rsc/bcc/Seniors/index.asp>.

The Bethesda-Chevy Chase Regional Services Center reserves the right to reject any entry at its discretion and the inclusion of resources on this list should not be construed as an endorsement by Montgomery County Government, the Bethesda-Chevy Chase Regional Services Center or its staff.

Community Partners

The Jewish Federation of Greater Washington
Beth Shapiro, Project Manager
(240) 283-6100

In 2003, Community Partners was created as a demonstration project with the financial support of the U.S. Department of Health and Human Services Administration on Aging. Over time, we have also been generously supported by grants from the state, the county and foundations.

Our mission is to "help seniors live well and live longer at home and in their community." In order for us achieve this mission, we offer seniors a variety of social, recreation, and educational programs all designed to make aging in place easier. By merely participating, many have met and developed friendships not only with their immediate neighbors, but with others from nearby towns. Inevitably,

participation in our programs has supported aging in place by connecting, if you will, neighbors with neighbors. If you are interested in discussing a partnership, please call (240) 283-6100. It may be just what the doctor ordered to enhance our mutual goal of supporting aging in place.

The Conflict Resolution Center of Montgomery County (CRCMC)

Address: 2424 Reedy Dr. Suite 301, Wheaton, MD 20902

Phone: 301-942-7700

Email: info@crcmc.org Website: www.crcmc.org

The Conflict Resolution Center of Montgomery County (CRCMC) offers free, quality dispute resolution services. If you find yourself in a conflict with a neighbor, friend, business, client, or friend, consider using mediation as an alternative to resolving your dispute through court. Mediation is free, neutral, confidential, and is aimed at reaching a solution that works! Services offered in English and Spanish.

Montgomery Coalition for Adult English Literacy

Address: 10605 Concord Street, Suite 440, Kensington, MD 20895

Rachel Glass, Executive Director Phone: 240-514-0172

Email: rglass@mcael.org Website: www.mcael.org

MCAEL is dedicated to strengthening the county-wide adult English literacy network with resources, training, collaborations and advocacy to support a thriving community and an optimal workforce. Their vision is that all adult residents are employable, engaged, and empowered by literacy to achieve their full potential.

Columbia Association - Community Exchange Time Banking program

The Community Exchange is a local Time Banking program offered through a partnership of the Columbia Association and the Horizon Foundation that **provides an opportunity for neighbors to help neighbors through the mutual exchange of everyday services.** Using Time Dollars as an exchange instead of money allows a member to earn a Time Dollar for every hour of service provided, and then use the Time Dollars to purchase services from any member in the network through the sharing of our needs and gifts, we sustain a member-driven community exchange where everyone can be a contributor, turning "you need me" into we need each other."

Visit <http://www.columbiaassociation.com/pdfs/getinvolved/CCEBrochure.pdf> or <http://www.camonthly.org/html/5.08/CCE.html> for more information.

Home Security Survey

The Montgomery County Police Department offers a free service to the residents of Montgomery County, in which an Officer will walk around the exterior and interior of your home to assess your security risks. The Officer makes recommendations on how to properly secure your home. To schedule a Home Security Survey, please contact:

Rockville District Station (serving Rockville & Potomac), Officer Michael Prather,
(240) 773-6070

Bethesda District Station (serving Bethesda-Chevy Chase and North Bethesda),
Officer Dana Matthis, (301) 657-0119 or (240) 876-1277.

Neighborhood Watch Training

The Rockville and Bethesda Districts also offer free Neighborhood Watch Training to communities.

Neighborhood Watch is one of the most effective and least costly ways to prevent crime and reduce fear. Neighborhood Watch fights the isolation that crime both creates and feeds upon. It forges bonds among area residents, helps reduce burglaries and robberies, and improves relations between police and the community we serve.

The training consists of a three-hour session one evening a week, for three weeks. The training will provide a history of Neighborhood Watch as well as create awareness, help to organize citizens, teach you how to coordinate with law enforcement, identify concerns, issues and problems, and develop strategies.

If your community is interested in having this training, please contact:

Rockville District Station (serving Rockville & Potomac), Officer Michael Prather,
(240) 773-6070

Bethesda District Station (serving Bethesda-Chevy Chase and North Bethesda),
Officer Dana Matthis, (301) 657-0119 or (240) 876-1277.

Cell Phones for Seniors

The 2nd District (Bethesda, North Bethesda) is offering cell phones to senior citizens.

The cell phone will allow the caller to call 911 only. For more information, please contact Officer Dana Matthis at (301) 657-0119 or go to:

<http://www.montgomerycountymd.gov/poltml.asp?url=/content/Pol/districts/FSB/2d/cellphones.asp>

Senior Forum- Free Movie

Join Officers Dana Matthis for a morning of safety information, door prizes and a **FREE** movie. This program is sponsored by the Montgomery County Police, P&G Theaters and Westfield Montgomery Mall.

Location: P&G Theaters Westfield at Montgomery, 7101 Democracy Blvd,
Bethesda, Maryland

Time: 9:30 a.m.

February 4, 2009 <i>Mamma Mia</i> (Musical)

March 4, 2009 <i>Made Of Honor</i> (Comedy)

April 1, 2009 <i>Sex in the City</i> (**Tentative**)
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May 6, 2009 <i>Leatherheads</i> (Period Drama)
--

June 3, 2009 <i>Miss Pettigrew</i> (Drama/Comedy)

For more information go to:

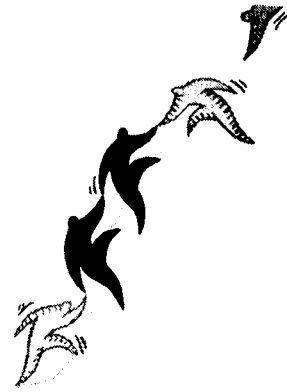
<http://www.montgomerycountymd.gov/poltml.asp?url=/content/POL/districts/chief/communityservices/seniorforum.asp>

Community Toolkit

Healthy community associations are vital to our civic life in Montgomery County. They are partners with local government in identifying needs, solving problems and setting priorities. This toolkit is designed to help you and your neighbors form associations and provide established neighborhoods with a wide variety of resources.

To view the Community Toolkit, please visit:

<http://www.montgomerycountymd.gov/bcctmpl.asp?url=/content/rs/bcc/ToolKit/index.asp>



Villages Resource Exchange

April 1, 2009

Let us know what you think!

In an effort to support the many volunteers who are striving to make their neighborhoods a better place for all residents to live and thrive, we began publishing the Villages Resource Exchange on our Center web page. We asked organizations interested in reaching out to the Villages communities and those interested in the Villages model to submit a short description of the programs and services they provide to be included.

Since the inception of the Villages Resource Exchange, we have included information on both County and non-profit agency programs, events, and services. Resources have included adult literacy, senior employment, volunteer support, and personal safety.

We would like to learn more about what type of information and support you need as you work to develop aging in place or Villages models in your neighborhoods. Please take a moment to complete this brief survey so that we can better support your efforts. All responses will be confidential and anonymous. To access the survey go to:
http://www.surveymonkey.com/s.aspx?sm=SSGfpljPHdtO8mj94vMAHg_3d_3d

Lotsa Helping Hands™

Miriam Kelty of the Bannockburn Neighbors helping Neighbors program shared her positive experience with Lotsa Helping Hands™. From their website:

Create a free of charge, private, web-based community to organize family, friends, neighbors, and colleagues – a family's 'circles of community' — during times of need. Easily coordinate activities and manage volunteers with our intuitive group calendar. Communicate and share information using announcements, messages boards, and photos.

No matter what your coordination needs, create community with Lotsa Helping Hands™. <http://www.lotsahelpinghands.com>

Liability Insurance for Villages

Volunteers working in community based Villages cannot be covered by County liability insurance. However, Bill Howard with Clarke and Sampson in Virginia has been very helpful to some County departments and agencies in setting up insurance programs. Here is the contact info:

Bill Howard
Clarke & Sampson, Inc
228 South Washington Street, Suite 200
Alexandria, Virginia 22314
Phone: 703-683-6601 X-115
Fax: 703-739-8967
Email: bhoward@clarkeandsampson.com

Recreation Department Makes Exercise/Weight Rooms in Community Centers Free to Seniors

Because physical fitness is particularly important for older adults, the Montgomery County Department of Recreation invites residents age 60 and over to take advantage of free use of exercise/weight rooms in its community recreation centers. Seniors can use the centers free of charge from 9 a.m. to 2 p.m., Monday through Friday. The rooms are equipped with a full circuit of self-administered weight and aerobic equipment that will help increase cardiovascular endurance, strength and flexibility. Learn more at http://montgomerycountymd.gov/apps/News/press/PR_details.asp?PrID=5337

Legal Aid Bureau- Senior Hotline

A Senior Telephone Hotline operates along with the telephone intake system from 9:00 a.m. to 4:00 p.m. (including lunch time) Monday-Friday. The hotline provides legal information and advice, brief services, community legal education, and targeted referrals to improve access and increase the number of services to older persons. (410) 951-7750 or (800) 458-5340.

Volunteer management software

Please click on the links below to get more information about volunteer management software available online. Many of them have on-line demos and free trials:

- [CERVIS](#) (Community Event Registration and Volunteer Management System)
- [CiviCore Volunteer Management](#)
- [CiviCRM](#), open source and freely downloadable
- [OrgAction Online Volunteer Database](#)
- [ROVIR, the Retriever of Volunteer Information and Reporting](#)
- [Samaritan Technologies](#) (eCoordinator)
- [Son of Service \(SOS\)](#) (free)
- [Tools for Organizations/Habitat Scheduling](#)

- [V2/Volunteer2/Volunteer Squared/Volunteer Impact](#)
- [Volgistics](#), Red Ridge Software
- [Volunteer Event Management \(VEM\)](#) from Volunteer Solutions
- [Volunteer Spot](#)
- [Volunteer Reporter](#) (formerly RSVP Reporter)
- [VSys One](#)
- [When to Help](#)

How to Start a 501c3 Nonprofit Organization

Click on this link to get more information on becoming a 501c3 Nonprofit Organization:
<http://www.wikihow.com/Start-a-501c3-Nonprofit-Organization>

Villages in Montgomery Forum

Our next Villages quarterly forum will be at the **Bethesda-Chevy Chase Regional Services Center on Wednesday, April 29 from 2:00 – 3:30 pm.**

The primary purpose of these quarterly forums is to provide an opportunity for neighborhood leaders to share information about the process and challenges of starting a "Village" in their community. The next forum will focus on opportunities for addressing the challenges Villages face that were raised at the January 21 forum. We will also have a presentation from the "Neighborhoods Ready" program, which helps communities prepare for meeting the needs of all neighbors in the event of an emergency.

Please RSVP to 240-777-8200 if you can make it. Don't forget that we will be posting resources for villages at our website:
<http://www.montgomerycountymd.gov/bcctmpl.asp?url=/content/rsc/bcc/Seniors/index.asp>.

March 2, 2009

Security for Seniors in an Uncertain Time – Friday, March 6, 2009

The Anastasia Room, Bethesda-Chevy Chase Rescue Squad
 5020 Battery Lane, Bethesda, MD 20817
 (Corner of Old Georgetown Road and Battery Lane)
 (240) 777-7828

Councilmember Roger Berliner invites you to a free forum on *Security for Seniors in an Uncertain Time* on Friday, March 6 from 2:00 – 4:00 pm. The forum will address financial, personal, and home security with special guest speaker U.S. Senator Ben Cardin as well as Mr. Stan Hinden, former *Washington Post* financial writer and author of *How to Retire Happy* and Commander Russ Hamill, Montgomery County Police.

Please call (240) 777-7828 for more information.

File of Life

Montgomery County Department of Health and Human Services
Senior Resource Line
240-777-3000 (TTY 240-777-4575)

The Montgomery County Department of Health and Human Services, in partnership with Montgomery County Fire and Rescue Services, is offering County residents a free '**File of Life**', a communication tool that emergency medical personnel can use to get quick information about an individual's medical history. The '**File of Life**' is a red plastic magnetic pocket that attaches to a refrigerator. Inside the pocket is information about health history, medications, allergies, and emergency contact information. Rescue workers are trained to look for the '**File of Life**' and report finding it can save valuable time, enabling quick assessments of medical situations. For more information, visit:

http://www.montgomerycountymd.gov/apps/News/press/PR_details.asp?PrID=5319. To request a free '**File of Life**', call the Department of Health and Human Services, Senior Resource Line at 240-777-3000 (TTY 240-777-4575).

Montgomery County Senior Site

Looking for services for seniors in Montgomery County? This website is designed to provide information on County services in one easy-to-find place. The Montgomery County Senior Site will provide information on a variety of topics.
<http://www.montgomerycountymd.gov/sentmpl.asp?url=/content/pio/senior/index.asp>

Home Delivered Groceries

Top Banana Home Delivered Groceries
Jean Guiffre Founder/Executive Director
Phyllis Courlander, Assistant Director
301-372-FOOD (3663)
FAX: 301-372-3662
<http://topbananagrocer.org>

Get shopping help with an extra touch. Easy ordering by phone. Drivers shelve groceries, open stubborn jars and more. Wide selection of brand-name products, meats, dairy, produce, "heat & eat" favorites and home/pet/personal items. Competitive prices. Fee based on affordability. Accepts EBT/food stamps. Delivering since 1982. **301-372-FOOD(3663)**. A not-for-profit organization funded, in part, by Montgomery County, Aging & Disability Services.

Montgomery Coalition for Adult English Literacy - updated

Address: 10605 Concord Street, Suite 440, Kensington, MD 20895

Rachel Glass, Executive Director Phone: 240-514-0172

Email: rglass@mcael.org Website: www.mcael.org

MCAEL is dedicated to strengthening the county-wide adult English literacy network with resources, training, collaborations and advocacy to support a thriving community and an optimal workforce. Their vision is that all adult residents are employable, engaged, and empowered by literacy to achieve their full potential.

For information on adult ESOL and literacy programs available in your community or to get involved as a volunteer, please visit www.mcael.org, where you can view a listing of services provided around the county by more than 50 partner organizations.

50+ Employment Expo – Friday, May 15, 2009

Marriot Bethesda North Hotel & Conference Center

5701 Marinelli Road (Across from White Flint Metro)

Call (301) 299-2017 to register

Over 50 and looking for the next step? The Jewish Council for the Aging is sponsoring a free 50+ Employment Expo on Friday, May 19 from 10:00 am – 3:00 pm. Meet recruiters from dozens of companies, including non-profits, government, healthcare, retail, technology and others ready to hire. For more information call (301) 299-2017 or visit: www.AccessJCA.org (JCA News & Events). Free parking!

SeniorCheckedSM Village Support

www.seniorchecked.com

1-866-650-7226

SeniorChecked can be a valuable partner for DC Metro Area Villages by offering many resources and tools, including:

- Access to the SeniorChecked directory of authenticated, vetted service providers, through both the Web site and toll free Support Center
- Customized quarterly SeniorChecked e-newsletter
- Village listing in the SeniorChecked Community Partners directory
- Database of Village members, including contact info and availability
- Volunteer background checks (SeniorCheckedSM Volunteer Check)
- Coupons and discounts for Village members
- Customized sub page on SeniorChecked Web site

RSVP - Responding to the Call to Serve

Montgomery County Volunteer Center

401 Hungerford Drive, 1st Floor Rockville, Maryland 20850

(240) 777-2610, Fax: (240) 777-2601

<http://www.montgomerycountymd.gov/mcgtmpl.asp?url=/Content/Volunteer/RSVP.asp>

RSVP, the Retired and Senior Volunteer Program, is a nationwide volunteer program for individuals over the age of 55 which is sponsored locally by the Montgomery County Volunteer Center. RSVP assists seniors in finding interesting and rewarding volunteer opportunities based on their skills, interests, life experience, geographic preference and time availability. Currently, over 600 RSVP members volunteer in over a wide variety of local public and private nonprofit organizations throughout the county. RSVP volunteers can:

- Improve the environment
- Write grant proposals
- Help the homeless
- Be mentors
- Tutor children
- Promote literacy
- Help low-income seniors prepare their taxes
- Help children and adults learn English
- And much, much more!

For an appointment to see what volunteer opportunities are available or for more information about RSVP, please call 240-777-2610.

February 3, 2009

In an effort to support the many volunteers who are striving to make their neighborhoods a better place for all residents to live and thrive, we are piloting the **Villages Resource Exchange**. Organizations interested in reaching out to the Villages communities and those interested in the Villages model can submit a short description of available programs and services to Leslie Hamm at Leslie.Hamm@montgomerycountymd.gov or call 240-777-8207. The Villages Resource Exchange will be posted online under "Partners" at: <http://www.montgomerycountymd.gov/bcctmpl.asp?url=/content/rsc/bcc/Seniors/index.asp>.

The Bethesda-Chevy Chase Regional Services Center reserves the right to reject any entry at its discretion and the inclusion of resources on this list should not be construed as an endorsement by Montgomery County Government, the Bethesda-Chevy Chase Regional Services Center or its staff.

Community Partners

The Jewish Federation of Greater Washington
Beth Shapiro, Project Manager
(240) 283-6100

In 2003, Community Partners was created as a demonstration project with the financial support of the U.S. Department of Health and Human Services Administration on Aging. Over time, we have also been generously supported by grants from the state, the county and foundations.

Our mission is to "help seniors live well and live longer at home and in their community." In order for us achieve this mission, we offer seniors a variety of social, recreation, and educational programs all designed to make aging in place easier. By merely participating, many have met and developed friendships not only with their immediate neighbors, but with others from nearby towns. Inevitably, participation in our programs has supported aging in place by connecting, if you will, neighbors with neighbors. If you are interested in discussing a partnership, please call (240) 283-6100. It may be just what the doctor ordered to enhance our mutual goal of supporting aging in place.

The Conflict Resolution Center of Montgomery County (CRCMC)

Address: 2424 Reedie Dr. Suite 301, Wheaton, MD 20902
Phone: 301-942-7700
Email: info@crcmc.org Website: www.crcmc.org

The Conflict Resolution Center of Montgomery County (CRCMC) offers free, quality dispute resolution services. If you find yourself in a conflict with a neighbor, friend, business, client, or friend, consider using mediation as an alternative to resolving your dispute through court. Mediation is free, neutral, confidential, and is aimed at reaching a solution that works! Services offered in English and Spanish.

Montgomery Coalition for Adult English Literacy

Address: 10605 Concord Street, Suite 440, Kensington, MD 20895
Rachel Glass, Executive Director Phone: 240-514-0172
Email: rglass@mcael.org Website: www.mcael.org

MCAEL is dedicated to strengthening the county-wide adult English literacy network with resources, training, collaborations and advocacy to support a thriving community and an optimal workforce. Their vision is that all adult

residents are employable, engaged, and empowered by literacy to achieve their full potential.

Columbia Association - Community Exchange Time Banking program

The Community Exchange is a local Time Banking program offered through a partnership of the Columbia Association and the Horizon Foundation that **provides an opportunity for neighbors to help neighbors through the mutual exchange of everyday services.** Using Time Dollars as an exchange instead of money allows a member to earn a Time Dollar for every hour of service provided, and then use the Time Dollars to purchase services from any member in the network through the sharing of our needs and gifts, we sustain a member-driven community exchange where everyone can be a contributor, turning "you need me" into we need each other."

Visit <http://www.columbiaassociation.com/pdfs/getinvolved/CCEBrochure.pdf> or <http://www.camonthly.org/html/5.08/CCE.html> for more information.

Home Security Survey

The Montgomery County Police Department offers a free service to the residents of Montgomery County, in which an Officer will walk around the exterior and interior of your home to assess your security risks. The Officer makes recommendations on how to properly secure your home. To schedule a Home Security Survey, please contact:

Rockville District Station (serving Rockville & Potomac), Officer Michael Prather,
(240) 773-6070

Bethesda District Station (serving Bethesda-Chevy Chase and North Bethesda),
Officer Dana Matthis, (301) 657-0119 or (240) 876-1277.

Neighborhood Watch Training

The Rockville and Bethesda Districts also offer free Neighborhood Watch Training to communities.

Neighborhood Watch is one of the most effective and least costly ways to prevent crime and reduce fear. Neighborhood Watch fights the isolation that crime both creates and feeds upon. It forges bonds among area residents, helps reduce burglaries and robberies, and improves relations between police and the community we serve.

The training consists of a three-hour session one evening a week, for three weeks. The training will provide a history of Neighborhood Watch as well as create awareness, help

to organize citizens, teach you how to coordinate with law enforcement, identify concerns, issues and problems, and develop strategies.

If your community is interested in having this training, please contact:

Rockville District Station (serving Rockville & Potomac), Officer Michael Prather,
(240) 773-6070

Bethesda District Station (serving Bethesda-Chevy Chase and North Bethesda),
Officer Dana Matthis, (301) 657-0119 or (240) 876-1277.

Cell Phones for Seniors

The 2nd District (Bethesda, North Bethesda) is offering cell phones to senior citizens.

The cell phone will allow the caller to call 911 only. For more information, please contact Officer Dana Matthis at (301) 657-0119 or go to:

<http://www.montgomerycountymd.gov/poltml.asp?url=/content/Pol/districts/FSB/2d/cellphones.asp>

Senior Forum- Free Movie

Join Officers Dana Matthis for a morning of safety information, door prizes and a **FREE** movie. This program is sponsored by the Montgomery County Police, P&G Theaters and Westfield Montgomery Mall.

Location: P&G Theaters Westfield at Montgomery, 7101 Democracy Blvd,
Bethesda, Maryland

Time: 9:30 a.m.

February 4, 2009 <i>Mamma Mia</i> (Musical)

March 4, 2009 <i>Made Of Honor</i> (Comedy)

April 1, 2009 <i>Sex in the City</i> (**Tentative**)
--

May 6, 2009 <i>Leatherheads</i> (Period Drama)
--

June 3, 2009 <i>Miss Pettigrew</i> (Drama/Comedy)

For more information go to:

<http://www.montgomerycountymd.gov/poltml.asp?url=/content/POL/districts/chief/communityservices/seniorforum.asp>

Community Toolkit

Healthy community associations are vital to our civic life in Montgomery County. They are partners with local government in identifying needs, solving problems and setting priorities. This toolkit is designed to help you and your neighbors form associations and provide established neighborhoods with a wide variety of resources.

To view the Community Toolkit, please visit:

<http://www.montgomerycountymd.gov/bcctmpl.asp?url=/content/rsc/bcc/ToolKit/index.asp>

Villages Resource Exchange

Exit this survey**1. Villages Resource Exchange survey**

In an effort to support the many volunteers who are striving to make their neighborhoods a better place for all residents to live and thrive, we began publishing the Villages Resource Exchange on our Center web page. We asked organizations interested in reaching out to the Villages communities and those interested in the Villages model to submit a short description of the programs and services they provide.

Since the inception of the Villages Resource Exchange, we have included information on both County and non-profit agency programs, events, and services. Resources have included adult literacy, senior employment, volunteer support, and personal safety.

We would like to learn more about what type of information and support you need as you work to develop aging in place or Villages models in your neighborhoods. Please take a moment to complete this brief survey so that we can better support your efforts. For each question, you may check all that apply and offer comments. All responses will be confidential and anonymous. Thanks!

1. I read the Villages Resource Exchange each month to see what is new.

- ☐ Yes
- ☐ No
- ☐ Occasionally, but not every month.
- ☐ Other (please specify)

2. I find the information useful...

- ☐ for my own personal use.
- ☐ in my work with the community.
- ☐ I don't find it useful.
- ☐ Other (please specify)

3. The information that I have found most useful relates to...

- ☐ Volunteer programs and resources
- ☐ Adult literacy
- ☐ Home delivered groceries
- ☐ Senior focused events
- ☐

Personal safety

- ☐ Senior employment
- ☐ Consumer protection
- ☐ Web-based information
- ☐ Service exchange models
- ☐ Conflict resolution
- ☐ Helping seniors stay in their homes
- ☐ Organizing communities
- ☐ Other (please specify)

4. I would like to see more information about...

- ☐ Transportation services
- ☐ Research based aging in place models
- ☐ Creating a website
- ☐ Legal support
- ☐ Tax information
- ☐ Neighborhood surveys
- ☐ Other (please specify)

5. Have you submitted a resource to be included in the Villages Resource Exchange?

- ☐ Yes
- ☐ No
- ☐ I haven't, but plan to do so.
- ☐ Other (please specify)

6. Would a Villages website separate from the Center's webpage be a better location for the resource exchange?

- ☐ Yes
- ☐ No
- ☐ I'm not sure

☐ Another option would be...

7. If such a website was developed, would your community be able to designate someone to help monitor the site?

☐ Yes

☐ No

☐ Maybe

☐ Comments?

Next

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SurveyMonkey.com
"Surveys Made Simple."

Villages Resource Exchange

Exit this survey**2. My involvement with Villages**

Please take a moment to give us a little information on your involvement with aging in place or Villages communities.

1. I live in a community that has...

- ☐ an equal mix of young families and seniors.
- ☐ primarily young people and families.
- ☐ a high population of seniors.
- ☐ a well organized civic or homeowners association.
- ☐ very little interaction between neighbors.
- ☐ Other (please specify)

2. I am interested in information on aging in place or Villages models because...

- ☐ I am a senior and would like to know more about available resources.
- ☐ I am looking into these models with other members of my neighborhood to see if it is right for us.
- ☐ I am a member of a community that has taken steps to set up a Village in our neighborhood.
- ☐ I am a member of an existing Village that is supporting seniors who want to stay in their homes.
- ☐ I am caring for an elderly parent who would like to stay in the home.
- ☐ I am a service provider who would like to get the word out about my services to seniors.
- ☐ Other (please specify)

3. If you live in a neighborhood currently working to develop the Villages model, where are you in making this happen?

- ☐ I am researching options and models to share with others in my community.
- ☐ My community leaders have met to determine interest among community members.
- ☐ We have surveyed our neighbors to identify their needs.
- ☐ Our community has developed a plan to move forward with a Villages model.
- ☐ We have established a working Villages model and are providing services to our residents.
- ☐ Other (please specify)

Villages Resource Exchange

Exit this survey

3. Thank you for your assistance!

Results of this survey will be shared in the May edition of the Villages Resource Exchange.

Prev Done

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The Care and Feeding of Volunteers:

The Why's and How's of Volunteer Management

For community leaders developing the "Villages" concept in their own neighborhoods and others interested in the model

Two sessions: Wednesday, May 27th and Wednesday, June 10th
Bethesda-Chevy Chase Regional Services Center
1:00 – 2:30 pm

Presented by: Barbara Hammack, M.A.

Each session will offer practical strategies to take back into the community to be implemented. You'll learn more about the "nitty-gritty" of volunteer management, including:

- Expectations and motivations of volunteers
- Recruitment, screening, training, placing and supervising volunteers
- Job descriptions for volunteers
- Best Practices

For more information or to register, please call Leslie Hamm at
240-777-8207 or email at
Leslie.Hamm@montgomerycountymd.gov

Registration will be limited to 20 participants
Participants must commit to attending both sessions
Up to two representatives from each community