Chapter 1: 
Introduction

The Village Guide (The Guide) was created for you – to provide insight, support, and encouragement to community leaders interested in creating a grass roots organization to benefit the quality of life of those living in the community. The Guide is a collaboration of village leaders in the metropolitan Washington Area (DC, Virginia, Maryland) who have shared their experiences creating their own villages.

The village movement started in 2006 in the Beacon Hill community of Boston. It was born of a desire of Beacon Hill residents to age and remain in their own home. As they faced the challenges of aging in place, they began to look for solutions to remaining in their own homes. Beacon Hill Village was born from the desire to age in place and to provide a structure to allow that to happen. Since 2006 the village movement has become a national movement with villages located throughout the country.

One truth this group of collaborators reached and strongly wishes to communicate, this Guide, while comprehensive, is not definitive. The village movement is organic, it changes and adapts to the needs of residents in each village community. There is a theme that overarches all villages and that is a desire of neighbors to help neighbors sustain a high quality of life.

The Village Guide, is just that, a guide. It is a compendium of a variety of information and experiences. It is meant to provide information and background, it is up to you and your leadership and resident members to decide on the model that best suits your community.

A word about how to use The Guide; each chapter is a stand-alone resource. The chapters should be considered specific references. As you move along the development process of your village, refer to the chapter that relates to where you are in your village development. Each chapter can be downloaded as a stand-alone reference.

In addition to The Village Guide, another important resource in the DC Metro area is the Washington Area Village Exchange (WAVE). This regional organization is comprised of members from the region’s villages. WAVE provides networking opportunities and as the name suggests, a vast variety of information exchange (www.wavevillages.org).

We hope you find The Village Guide a useful tool in your process of creating and launching the lifestyle option of “village” living in your community.
Services the village may choose to offer:

When deciding to affiliate with a village, most people think of providing services that neighbors/village members ask for. This is, for most people, the reason for establishing a Village in the first place.

The needs of your community will determine which services your village will provide. You can determine community needs in findings from a community survey and/or community meetings, and by a number of other factors, such as the abilities and availability of volunteer, paid staff, third-party, or other services providers. Needs of older residents often fall into the following areas.

1. **Transportation**
   Experience has shown that transportation is the most widely requested resident service. Your Village governance, in conjunction with your community, must decide whether your village will provide transportation for residents, and if so, if it will be provided:
   - By volunteers only;
   - By volunteers whenever possible;
   - Through professional transportation services if no volunteer is available;
   - Through volunteer transport to a site outside the boundary area, if any; and
   - For groups of residents attending an activity such as a concert or theatre performance who cannot be accommodated in a personal vehicle.

2. **Social Engagement**
   Most residents who use village transportation services think of getting to where they need or want to go when they want to get there. Few think of transportation provided by villages as a social interaction. However, for residents who rarely leave home and have few visitors, social engagement with a volunteer driver and/or another passenger can be an important unintended benefit.

   Research has consistently demonstrated that intellectual, social and physical activity are critical to healthy aging. Villages foster social engagement by: volunteer making friendly visits with village members who request such a service; group discussions; exercise classes; speakers, coffees, teas and happy hours; and outings to restaurants, museums, parks, concerts, theatre performances, etc. Villages experiences show that group social/recreation activities may be the most popular and well attended types of activities.

3. **Household Chores**
   There are a variety of household chores that older residents find challenging or unsafe, and that easily can be done by more agile volunteers. Among them are yard work, such as raking leaves, cleaning gutters, shoveling snow, minor plumbing, electrical repairs and other small repairs such as changing lightbulbs, checking/resetting circuit breakers, changing washers, unclogging a sink or toilet, and nailing or screwing in something that has become loose.
Some Washington area villages vet providers whom they recommend, often with negotiated discounts. Others rely on less formal recommendations from residents who have been pleased with specific providers. Still others adhere to a “volunteer first” model and suggest an outside service provider only if there is no volunteer to provide the help needed or if a knowledgeable volunteer judges that a professional company is most appropriate.

4. Computer/IT Help
Montgomery County data (2012) indicate that 74 per cent of older residents use computers. These figures probably are similar for nearby jurisdictions. However, many older residents feel they are unable to learn programs and deal with software changes and updates. Becoming accustomed to a new computer and setting it up also may be frustrating for older residents. Yet, those who do use computers—either their own or computers in public places such as libraries—understand that computers allow easy communication with children and grandchildren, and facilitate finding information, shopping, confirming appointments, and other necessities.

In addition, older adults appreciate help learning to master use of smart phones and other electronic devices. These devices can be important not only for basic information and communication, but also for medical and safety issues. For example, older people can use many small electronic devices to monitor medical issues such as blood pressure, cardiac function, activity level, sugar levels. Helping residents learn to use the devices properly is an important service. In villages that are intergenerational, teenagers often provide computer and other IT help. The interaction between younger and older generations can be a rewarding social interaction. Some villages offer group classes in use of IT devices. In others, volunteers provide individual help and troubleshooting as needed.

5. Organizing Mail, Bills, Medical Records, Financial Records, Photo Albums, and Other Items of Importance.
People who feel that they have too much to handle appreciate assistance with organizing things. Volunteers may help organize important papers, organize and help pay bills, balance a checkbook, reconcile credit card accounts, go through mail, etc. Organizational chores may be especially challenging for people who have visual impairment or mild cognitive impairment or for those who have been away or just let things pile up. Setting up a filing system in a way that makes sense to the person being served can help them feel more organized and in control.

Hoarding is a problem for many older people. Too much “stuff” can be a safety hazard and can make the home unpleasant. Volunteers who help older people organize their things can also help prevent or discourage hoarding by advising them and helping them to get rid of old newspapers and magazines, spoiled food, and all kinds of junk that has accumulated.

6. Health Related or Other Physical Services
Health-related services range from helping people identify public and private resources to giving direct assistance with exercises, changing dressings, medication management, accessing electronic medical information or records, and supporting goals of physical, occupational, and
other therapies. Villages often have health provider professionals who are willing to volunteer in assisting with older residents' health needs. The type of health-related work available depends on the comfort level of the volunteer and resident, training, and the level of need. For example, a frail person may bathe on his/her own but feel most comfortable if another individual is in the home to get appropriate help should the older person fall. Some volunteers and village governance may feel such an activity is appropriate, while others may decide it is not.

Village volunteers often assist visually impaired neighbors or those with hearing or mobility impairments. Neighbors may read mail or read literature to persons with visual impairment or assist with other paperwork. Village volunteers or staff also may recommend resources and equipment designed to help visually impaired people function independently. People with hearing impairments or even cognitive impairments may appreciate conversation with another individual. They may be able to hear or follow an individual but have trouble in a social setting in which multiple conversations are going on simultaneously.

7. Equipment Loans
Family members who are out of town and visit from time to time may need car seats, high chairs, folding beds or air mattresses, children's' books or toys, cribs etc. Family or older residents may need a wheel chair, crutches, or canes or other medical supplies for temporary use. Several villages lend equipment as a service. Some villages have a loan closet while others use a listserv to locate items on an as-needed basis. Borrowers greatly appreciate these loans.

8. Check-in Program
Many villages offer telephone check-ins to confirm that residents are okay. Residents can be greatly reassured by knowing that neighbors care about them and that if there is a problem, they have someone to contact to tell them about it. Village members indicate to the volunteer coordinator that they would like to receive such calls and they are matched with someone who is interesting making check in calls.

9. Security Watch
Volunteers may check homes, pick up mail and newspapers, water plants, etc. when a resident is away from home for a few days, a more extended time, or when somebody is hospitalized or in rehabilitation.

10. Social/Educational Programs
Social/educational programs help build community. Many Villages start such programs in their village development stage and recruit future volunteers and services users from these programs. Programs may range from topics germane to older persons, e.g. money management, difficult conversations with adult children, estate planning, on being a widow or widower, etc. to topics that appeal to the community more broadly, e.g. robust walking, digital photography workshops, backyard gardening, local birds, political topics, trips to museums, theater, or local senior centers.
Chapter two: Getting Started:

Getting started may be as simple as a conversation with a friend or neighbor about an interest in continuing to live in the community as you age. Once you have identified an interest, the next steps may vary. The following are suggested steps you should consider as you begin your journey.

The embryo of a new village often starts with a group of neighbors at an informal gathering talking about the issues facing them as they confront the realization of aging and the challenges of staying in their own homes. This group often reinforces individual desires to continue to live in their neighborhood and a need to figure out how to accomplish that goal.

One of the first steps is to let your community know about your ideas and interests. If there is interest in creating a village, you might ask interested people to join you to establish an exploratory committee. The exploratory committee’s goal is to facilitate a program that supports aging in place while maintaining a healthy and robust quality of life. It is a high priority to identify others who are willing to contribute efforts to creating a village-type organization for a sustained period of time (2 – 3 years). Creating a village is not a one-person effort and takes time to create!

The following are some suggested steps you should consider as you organize your village:

1. Do your research.
   a. Learn your community demographics—who lives in your community, ages, incomes, family sizes, ethnicities.
   b. Talk to other village organizers within the region and to members of Washington Area Villages Exchange (WAVE). There is a wealth of information to be obtained from others’ experiences. Some Villages have written detailed documents outlining their start-up process, as well as best practices and lessons learned.
   c. Check the web. There is a lot of information available online.
   d. Local governments have maps and census information. Census and demographic information is also available online as well as through third-party sources such as real estate offices or Chambers of Commerce

2. Identify geographical boundaries.
   a. Check your local government for community and subdivision maps within the jurisdiction. The local government also has information that details subdivision names. The recorded subdivision can be used as the geographic definition for the community service area.
   b. One of the leadership’s early decisions is to identify the physical geographic boundaries for the Village. It is not always a simple task to identify village boundaries and may require discussions about
the criteria for boundary setting. This decision is not set in stone and may change as the village evolves, but it is helpful to have an initial sense of who you would be reach out to.

3. Leadership
   a. Early Leadership: Early in the organizational period an interim leader or co-leaders should be selected from your team. A group leader or coleaders need to be identified early, as they take on the responsibility of coordinating group efforts and moving the group forward. One of the first discussions the leadership team should have is to define the roles of the team as a whole and the tasks that need to be addressed to stimulate the creation of an operating village. Each team member must accept the responsibility for at least one of the identifiable tasks.
   b. Community representation: Ideally, the leadership should represent age, gender, class, and ethnicity of the community. Whether you plan to develop an intergenerational village or a village to serve the older adults, your leadership would be stronger if you as many cohorts of your community as you can. However, often, the leadership will be self-selected individuals who want to start a village. Leadership diversity should be a goal and achieved to the level possible. A document on diversity is forthcoming.

Keep in mind that every new organization starts with a vision and with a dedicated core of individuals ready and willing to make that vision a reality. As your group gets started you will be setting the tone and direction for your Village. Consider starting small and building on your successes. Establish an ability of the leadership and volunteers to deliver on their promises. You can always add programming as you find a need and demand.
Chapter 3:

Exploratory/Planning Committee work:

This chapter will cover the various aspects of the Planning Committee’s work prior to launch. As stated in Chapter Two, this work may take 2-3 years. Even though these tasks are outlined in a sequence in this text, it is not a rigid process and your planning group may want to organize its work differently.

**Develop a Mission Statement**

Developing a mission statement for your village is one of the important early tasks your leadership group undertakes. The mission statement sets the tone for your village, and it is often one of the first sentences visitors to your website read.

The mission statement offers your vision for establishing whom you hope to serve, and how. An example of a mission statement: "The purpose of Friendly Village is to support the lifestyle needs of the residents of the village that allows them the choice of continuing to live in their current home and community while sustaining an acceptable quality of life."

Some villages tend to use a statement of purpose, rather than a mission statement: Example: "We are a non-profit, volunteer-driven organization for Chevy Chase seniors to keep us connected and active in our community as we age in place." [Chevy Chase @ Home]. It may be helpful to look at the mission or purpose statements on a few village websites as you go through the process of determining what best suits your situation.

**Do you have everyone you need at the table?**

It has already been said that developing a village is not a one-person job. Whether your effort begins as neighbors talking informally or one individual who has articulated the vision, a working group needs to be established. Early organizational meetings deal with a wide range of issues, group organization, group leadership, and defining and assigning leadership roles. You may wish to refer to this initial leadership group as an “Exploratory Committee or Group” to make it clear that you have not reached specific decisions but are looking at alternatives as you become educated about Villages. Your early leadership team should be willing to commit the time and energy to the creation of your village for approximately 2-3 years. Qualities helpful to your leadership team:

i. Dedicated to the Village concept: You are starting something new in your community and you need a team of leaders who enjoy working on new ventures and exhibit an entrepreneurial willingness to experiment.

ii. Respect for diversity of opinion: It is critical that people with different opinions can work together effectively
iii. People skills: It will be helpful to have one or more people who like interacting with people and who are skilled communicators. These people will interact with your neighbors and build grass-roots support for the village. They will also recruit people to work on shaping the village and refining its goals and activities.

iv. Contacts: The leadership will need to approach organizations, community groups, and members of the community to ask for help, money, and support. Knowing a wide range of people within the community is helpful; being a respected member of the community is essential.

v. Nonprofit and/or professional expertise: It will be very helpful (though not essential) to have members of your leadership team who represent some of the following areas of expertise:
   - Financial/accounting
   - Legal
   - Fundraising
   - Management experience in other nonprofit organizations
   - Experience managing volunteers

   Experience with aging and the elderly

Initial leadership of an Exploratory Committee tends to be self-selected, often from among those who attended the first meeting. If you are fortunate, you have a wide range of abilities and skills represented in this early group. But you also should discuss accountability among the group members who volunteer to take responsibility for, or the lead on, specific activities. Developing and maintaining a timeline that designates tasks, responsible persons, deadlines and actions, and updating and distributing such a timeline before each committee meeting may go a long way to identifying early on whether or not you have the right person for a particular task or if you need to make an adjustment.

**Define the Village Boundary**

Most villages have geographic boundaries, but other models have begun to emerge. You want to be clear in any communication to prospective village participants that they are eligible to participate by virtue of living within these boundaries. You can always expand the boundaries at a later date, but you may wish to focus initially on an existing community or political subdivision. If several subdivisions together form a village, be sure to engage any neighborhood or homeowner association early in your discussions, as they can be helpful allies in many aspects of developing a village. These associations generally follow subdivision boundaries and may have useful demographic and other data about the communities you are targeting. They may also have communication channels you can tap into to get the word out, such as neighborhood association newsletters, websites and/or listservs.
Has the Neighborhood Association Already Conducted Any Surveys?

You do not necessarily need extensive age demographic data early in your village development. It might be enough to get a handle on the age distribution for your zip code, which can be obtained via American Fact Finder (factfinder.census.gov). You can verify age groups and the size of each cohort within your specific boundaries through the needs assessment survey that each village is encouraged to conduct.

If you want additional information about streets and homeowners in your neighborhoods, you can access assessment data that are available in many jurisdictions. One village made a list of all the streets (25) in its two subdivisions and then compiled information by street, arranged in alphabetical and house numerical order, for use in developing its block coordinator system (block coordinators or block captains are identified residents who are assigned responsibility to communicate with their close neighbors, know who may be in need of support and serve as the representatives of the community). It allowed easy tracking of door-to-door leaflet distribution efforts and dissemination of information.

As we revise this document, some communities are organizing around characteristics other than neighborhood, such as religious affiliation, ethnicity, or cultural affinity. Many of these organizations may not call themselves villages but they function in similar ways. In addition, some villages are exploring ways to collaborate with their local houses of worship. This is a burgeoning area that is worth considering. If you are interested in developing a village around a cultural or faith group, most of this guide applies to you, with some needed modifications. We welcome any contribution readers may have on this topic.

Define the Target Population

Making a decision about the profile of the group your village intends to serve will influence your programming and goals. There are several choices for your Exploratory Committee to consider. Your village can choose to be intergenerational and include all neighbors living in your targeted neighborhood. Or you may decide to serve a senior audience. If you decide that your village mission is to serve a senior audience, you must define senior either by age, ability, or both. Deciding on your target audience will affect everything else you do.
By including younger families, you may find your prospective volunteer base expanding and younger neighbors committing to the concept of “aging in place.” Older persons without close family nearby may be willing to volunteer as parent helpers. Younger participants may be engaged as volunteers on technical communications issues that might be needed by older residents, or on tasks like website design and maintenance that benefits the village. Teenagers may be glad to perform certain volunteer tasks as part of their school’s community service requirements, as long as you know the rules governing such services.

**Form Committees or Subgroups to Divide the Work**

Prior to introducing the village concept in an initial community meeting, you may find it helpful to ask your planning group to develop subgroups or committees, to get tasks done. These committees are a great way to get more people involved in your village. Initial committees may include:

- Community survey;
- Communications, which can include newsletters, websites, flyers, phone calls, and listservs;
- Social activities;
- Legal Issues, such as incorporation and tax-exempt status application, if you decide early on to choose this model;
- Governance;
- Fund-raising;
- Finance and Budgeting;
- Marketing;

Once you have secured wider community buy-in after the introductory community meeting, you can add additional working groups.

**Get the Word Out**

Once your Exploratory Committee has developed its mission statement, defined the geographical area and the target population, selected a name and a logo, and collected sufficient data on the neighborhood, it is time to get the word out to gauge the broader interest in a village for your area. Begin to plan
an introductory community meeting at which the village concept will be explained, questions answered, and where attendees will have the opportunity to hear participants from active villages talk about their experiences—the good, as well as what they might have done differently with hindsight.

Develop an inventory of how other neighborhood entities can assist you in disseminating information about what you are trying to do. What communication channels such as newsletters, websites, or listservs already are in the area?

Disseminate a “save-the-date” flyer with brief information about developing a village in your community. Provide a link to a website such as another village website or the WAVE site from which residents can learn more, along with a contact email or other address. This is likely the first information most residents will receive about these plans, although they may have seen stories in the media about villages. Responses to this introductory flyer will constitute your early list of participants who want to be kept informed of your plans and whose names and contact information you should enter into a database. You are unlikely to wish to establish your own website or take other steps until after your community meeting, when you would have a sense of sufficient buy-in and interest to move ahead.

Your County or town government may have a designated staff person who can assist in getting word out in various ways. Civic or homeowner associations may also have resources like block-workers who can help disseminate information house-to-house— an important dissemination method until you have your own distribution list or your own village block-workers. And you can place a flyer in public places like libraries, store bulletin boards, and other places, as well as send articles to local newspapers.

**Develop a Database of People Who Want to Be Kept Informed**

The database, which initially is used primarily for communication purposes, can be maintained electronically in a format for ease of sorting, for a variety of purposes. Initial fields might include;

- First and last name (you need to decide if you are going to list all persons in a household as individual “records”);
- Email address;
- Street address (suggest one field with the following order (street, followed by house number, as in Anystreet 1234), which allows sorting
by alphabetical street and the homes in numerical order. This may not apply to where there are multiple housing units, apartments etc.);

- Home phone number; and a designation which phone is preferred; and
- Cell phone number or other preferred contact number.

Data confidentiality must be maintained for anyone using the information. It is also important to ensure that these personal data not be used for commercial purposes. There are several ways to accomplish this including signed confidentiality policy statements for all with access to the data base.

Additional fields depend on what information you wish to capture. One village added columns for whether or not the initial survey had been returned; whether the individual wanted to help develop the village, committees they had signed up for, and a general comment field in which special information was noted. This data base may be expanded as the village becomes operational to include volunteer roles, member designations, or other data that a functioning village must maintain. Local village consortia also may offer more extensive data bases, which may serve far more functions than just tracking initial contact data.

**The Community Needs Assessment Survey** (include paper, online options and delivery methods)

A needs assessment is important to determine your community residents' interest in being a part of a village. It will help identify the programs they would like to see implemented and assist the leadership to establish a scope of services to offer. The survey results may help your village leadership to plan for your next steps. Just as important, your survey serves as an outreach tool, to inform your community about the village concept and recruit interested contributors.

Village needs assessment surveys range from one to several pages in length. A small subgroup of your Exploratory Committee should review sample surveys and select content that allows you to select questions that you might offer in a particular village model. You might also benefit from pilot testing the survey with ten randomly selected participants from those on your initial mailing list. Explain why you are pretesting the survey and ask for their comments on both content and the process of completing and returning the survey.

It should be noted that some developing villages starting very small, perhaps primarily with social activities, use very simple surveys, asking a few
questions about program preferences and hand their surveys out at neighborhood functions. Each method has its place depending on the scope and timing of your village development.

Understanding the depth and scope of preferred services will impact budgeting, neighborhood volunteerism, outside community resource support, strategic partnerships, and scope of government assistance.

If your local government has a village liaison or staff member who supports “Aging in Place” initiatives, this individual may also be a resource. Staff members at your local jurisdiction Area Agency on Aging can advise your group in developing the neighborhood assessment document. They can also provide assistance in having the returned assessments analyzed. It will be up to the leadership group to promote and publicize the needs assessment, alert residents to expect to receive the assessment, and to explain to residents the importance of completing the assessment and returning it. It is important to get a strong response to the needs assessment; this may be the first test of the leadership’s skills and commitment to getting the job done.

Once your group has consensus on content and dissemination methods, dissemination of the survey questionnaire can take many forms and may include multiple dissemination methods:

- Launch it at your 1st community meeting;
- Post it on your neighborhood association website or send via email on listservs or in newsletters;
- Hand-deliver a copy to each household in your neighborhood; this will ensure that each household receives a copy, in particular those who may not use Internet or email.

One village received not only completed surveys, but thoughtful thank-you letters and personal stories why the recipients welcome this development.

**Develop a Village Model That Suits Your Community** (based data collected and feedback from community) See chapters 4 and 5 for more information on this topic.

Your survey will, in most cases, provide a wealth of information to guide your next steps. Use this information to help you identify others who will help develop your village or serve as future volunteers to provide services.
Develop Your Loose Timetable

Most villages take months to a few years to become operational. After you receive your survey results, your group should select a timetable that allows careful consideration of the need for Exploratory Group members to understand village operations, different models, and prospective volunteer and member expectations. The timetable differs from the timeline referred to earlier in this chapter. The timeline is more of an internal method to hold committee members accountable for tasks they undertake.

Assess Need for “Seed Money”/ In-kind Contributions

Early in your Exploratory Committee work, expenses may begin to crop up, for example for copying, printing, website or newsletter hosting, or filing for incorporation or 501(c)(3) designation. We recommend that a Finance/Budgeting Committee be established to identify anticipated expenses and ways to meet the need.

There are many ways to get seed money before you can offer tax-deductions for any contributions received. Local businesses may be willing to provide in-kind goods or services, like refreshments or printing costs. Local institutions often have community outreach programs that might be tapped for small expenses. Exploratory Committee members in many instances foot the initial costs of expenses, and many villages ask for contributions at their meetings. Some revert to common fund-raising methods like bake sales, lotteries, or fundraisers at which a portion of the proceeds go to village development. If tax-exempt status is obtained, a village can solicit donations and creatively ask that residents financially support their village. Once a village is operational, depending on the model it has chosen, finance, budgeting and fund-raising need to be considered entirely differently.

Find a Home

It is helpful, though not essential, to find a place that your village can call home. If your community has a clubhouse with meeting space, that is ideal. For communities with no internal community meeting space, you may find a local church, synagogue, or mosque willing to host your village meetings. Other meeting options might include: local libraries and schools; businesses, such as banks, restaurants, or health facilities with conference rooms or meeting spaces; local government buildings; and of course members’ homes.
Building Community

While you are working on the more formal organizational steps, remember that you are building a community. Many villages choose to begin this process by offering social events long before they formally provide services on request. As shown in some of the village profiles in Chapter 5, several villages spent a year encouraging social interactions among neighbors through various interest groups, such as book clubs, walking groups, and other activities. As neighbors begin to interact around shared interests and get to know one another, participants gain the trust necessary to both request services from the village and serve as its volunteers. The sense of community is strengthened.
Chapter 4:
Making Your Village Operational

The saying “you have seen one village, you have seen one village” still holds true, even after 12 years and 150 villages in the making! As you will see in chapter 5: Examples for different villages, there really is no prescribed way to operationalize your organization. On the one hand, the absence of easy-to-follow, well-outlined steps can make the creation of your village a more daunting task. But the upside is that it offers you freedom and flexibility to create a structure that corresponds to your unique community.

Villages’ structures and functions exist on a spectrum from highly organized to fairly loose.

- Some are incorporated. while others are not.
- Some charge dues, some do not (cost vary greatly).
- Some offer a limited scope of service, while others have more expansive scopes.
- Some have paid staff other rely on volunteers only.
- Some are strongly linked to civic associations, while other have no link at all.

As you can see, it is quite difficult to capture what exactly a village is like. In this chapter, we will attempt to outline some of the decisions you may want to make when developing your own village model. There may be additional elements we have not touched on. We will be happy to expand and improve this chapter with the community’s feedback.

The operations structure of your village should flow directly from your exploratory work’s outcomes (see chapter 3). The data you have collected is the bedrock of your structure. Sometimes, it is very clear to the planning group how they would like to structure their village, and sometimes there are disagreements. When considering the various positions, use the information you have collected to assist you in reaching a decision. Call other villages that seem to have the structure you are considering; find out what they do to help you, and what they think about your ideas.

The following pieces of information are your aides in this process:
- **What is the size of your community?** A small community with an existing support structure may not need extra layers of organization. Examples are civic and neighborhood associations and communities of faith.
- **Who lives in your community?** Do you have a fairly large population of older adults (more than 30%) or mix of age groups?
- **Is your community cohesive?** Transient? Multicultural? Urban? Rural? These demographic data affect how you choose to organize.
• **What are the needs and interests you have documented?** Is the community asking for a comprehensive array of services, or are people asking for social opportunities? The volume of work you plan to accomplish will also affect the organizational structure.

• **What are your leadership team capabilities?** Many village founders have struggled with the need to balance vision and practice. The key is to find that sweet spot between the two. Successful villages rely heavily on local leadership. This does not mean that you do not need to partner with organizations and entities in your area, but they are no substitute for internal organization, vision, leadership and management. In addition, villages have witnessed tremendous personal growth of their leadership. Village leaders have developed new skills over time. Mentorship by other villages is one way a village can equip itself with skill sets it may lack initially.

The following is a list of decisions to make when designing a model. Each decision point is further explained below.

- Do you wish to incorporate as a free-standing entity or operate under another organization? (See the chapter on legal requirements for more information).
- Do you wish to apply for an Internal Revenue Service non-profit designation?
- Do you wish to collect dues? If so how high should they be? Will you have a subsidy program?
- Will you use an all-volunteer model or hire a staff person?
- Is membership open only to a specific group or are you open to anyone in your geographical boundary regardless of age?
- What services will you offer?
- How will you manage the direct services and administrative business of the organization (records and accountability)?

**Do you wish to incorporate as a free standing entity or operate under another organization?**

From local experience, even villages that are not incorporated are affiliated with another local nonprofit or government organization. Whether it is a city’s social services, a civic/neighborhood association or a community of faith, villages become an “extension” of the existing nonprofit and are able to utilize the advantages associated with nonprofit status. The real question is whether your organization should be a stand-alone village or operate under the auspices of another organization (such as a civic association, faith community, or a local nonprofit).
Below are the considerations for creating your own nonprofit:

<table>
<thead>
<tr>
<th>Free Standing Organization</th>
<th>Affiliated under another entity</th>
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<tbody>
<tr>
<td>• Independence in decision-making process and implementation.</td>
<td>• No costs for incorporation and IRS tax exemption, and no annual reporting need.</td>
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<tr>
<td>• Ability to grow beyond the boundaries of the original community if the need arises.</td>
<td>• Affiliation with the existing nonprofit may offer access to resources not available otherwise.</td>
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<tr>
<td>• Potential to access funds not available to the existing nonprofit.</td>
<td>• Potential cost savings (access to volunteer insurance, office space, phone, website, etc.)</td>
</tr>
<tr>
<td>• Ability to create a Village identity that is free from association of the existing nonprofit.</td>
<td>• The community may be more likely to adopt the new village idea if it comes under the auspices of a known and trusted group.</td>
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<tr>
<td></td>
<td>• The nonprofit can offer its communication assets (email lists, newsletter, etc.) to promote the Village</td>
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If you choose to create a freestanding nonprofit, there are resources available that can help you in the process. This Guide has a section on the basics on incorporations and the 501 (c)(3) application, but we strongly recommend consulting with a legal expert to avoid making errors that could cause you trouble down the road.

If you choose to go under the auspices of another nonprofit, it is recommended that you create a Memorandum of Understanding that would formalize the relationship and clarify expectations, roles and responsibilities. It is essential that you secure the support of the host organizations’ board for your activities ahead of time to avoid any potential conflicts.

**Will you collect dues?**

<table>
<thead>
<tr>
<th>Collect Dues</th>
<th>Not Collect Dues</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Funds will be available for operating the Village.</td>
<td>• Collecting money requires a traditional nonprofit governance structure (501 c3, bank account, accountant, treasurer).</td>
</tr>
<tr>
<td>• The Village may be able to hire staff.</td>
<td>• It may deter those experiencing financial hardship from joining, thus creating an exclusive community.</td>
</tr>
<tr>
<td>• People are more likely to be invested when they put their money on the line.</td>
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</table>


Collecting membership dues requires a mechanism to collect and keep track of funds. You will need a bank account and an accountant. You will also need a database to track this information. Village dues range from $10 to $1000 annually. The average annual membership for a household of two is $400. Note that Villages that hire staff report that about 60% of their expenses are covered through membership and all Villages must have a robust fundraising plan to cover all their annual expenses. Villages that do not hire staff and charge a lower membership fee do so not only to have funds to operate but also as a mechanism to encourage ownership.

**Will you use the all volunteer or hire a staff person?**

<table>
<thead>
<tr>
<th>Hire Staff</th>
<th>All Volunteer</th>
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</thead>
<tbody>
<tr>
<td>• Responsibility for operations, management and administrative clearly defined.</td>
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</tr>
<tr>
<td>• Less strain on leadership</td>
<td></td>
</tr>
<tr>
<td>• Professional staff is an additional resource.</td>
<td></td>
</tr>
<tr>
<td>• Better capacity for growth</td>
<td></td>
</tr>
<tr>
<td>• Accountability.</td>
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<tr>
<td>• Lower membership dues and costs to residents who want to participate.</td>
<td></td>
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<tr>
<td>• Less financial strain to sustain the organization.</td>
<td></td>
</tr>
<tr>
<td>• Can create a greater sense of community.</td>
<td></td>
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<tr>
<td>• Less need for office space and other office infrastructure.</td>
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</tbody>
</table>

The decision to hire staff has significant financial and legal implications. Staff will require higher insurance and you will need to take into account other related expenses (such as workmen’s comp, fringe benefits etc.). Some villages launch their operations with the intention to hire staff when they have enough money in the bank (the convention is $30,000 in the bank before posting a job opening).

**Is membership open only to a specific group, or are you open to anyone in your geographical boundary?**

<table>
<thead>
<tr>
<th>Open to a Specific Group</th>
<th>Open to Anyone</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Clear mission</td>
<td></td>
</tr>
<tr>
<td>• Easy to identify the audience</td>
<td></td>
</tr>
<tr>
<td>• Easier to design communication materials</td>
<td></td>
</tr>
<tr>
<td>• Better understanding of the needs and tailor the programs accordingly</td>
<td></td>
</tr>
<tr>
<td>• Better growth potential</td>
<td></td>
</tr>
<tr>
<td>• Easier to recruit volunteers of all ages</td>
<td></td>
</tr>
<tr>
<td>• Fits communities with an even mix of generations</td>
<td></td>
</tr>
<tr>
<td>• Able to accommodate people with disabilities of all ages</td>
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</tbody>
</table>
What services will your village offer?

The Services Chapter covers the wide variety of services different villages offer. There are some commonalities among most villages, but you have the freedom to offer what you think meets the needs of your village. Many villages start small: just one or two services (that are perhaps easier to develop or that the community gave as high priority). Then, when the board feels it is time to do more, they slowly expand the offerings. If you have a passionate board member who would like to develop a certain program or service, consider delegating that to that person. This will allow you to tap into the wealth of resources and skill sets that are unique to your community. The idea that you need to replicate exactly what other communities have done may stifle creativity within your village.

How will you manage the direct services and administrative business of the organization (records and accountability)?

Regardless of the model you choose, you will need a way to keep track of your activities and your people. Most villages spend a great deal of time researching databases and administrative solutions. Village to Village Network has partnered with Club Express, which an online tool to manage association. They offer a website template and a comprehensive data management system. Villages find that they need at least one person who is comfortable with technology to make a sound decision and set up the systems.

Some villages use simple Excel or Access software. The data collected with these two seawares cannot easily be shared between different users since they are stored on a hard drive and not in the cloud.
Chapter 5:
Examples for Local Village Structures/Models

As explained in Chapter Four, there are many ways you can design and organize your village. Village planners benefit greatly from learning about concrete examples for how other communities chose to develop their villages. In this chapter you will find a variety of village case studies. We thank the villages’ leaders who have provided these examples. Please note that some of the information provided may change over time, as villages grow and evolve. These cases were written up in June of 2015 and were updated as much as possible. We invite other villages to share their examples as well. If you wish to contribute and/or update information about your village, please contact Pazit Aviv: pazit.aviv@montgomerycountymd.gov

Each case study below contains a link to the village’s website for further research. Feel free to connect with the villages directly. The villages are sorted alphabetically.

Bannockburn Neighbors Assisting Neighbors: NAN
Non-membership, non-dues based village within one civic association area

bannockburncommunity.org/nan.php

1. Describe your village community
Bannockburn is a suburban neighborhood in Bethesda. The community was conceived in 1944; a Group Housing Cooperative was formed to build houses and a community, and a failed golf course was purchased at auction. During the war, construction was not permitted, but by the early 1950s, pilot houses were built. Bannockburn has grown to about 500 households and now has expanded to include adjacent neighborhoods, Fairway Hills and Merrimack Park.

Today, just under 20% of Bannockburn residents are age 65+; 65% are married, 51% are female, 87% were born outside of Maryland, and 25% are foreign-born. In contrast to the original modern, but modest homes, average housing prices currently are just under $1 million. The ethnic diversity of Bannockburn is due to its population of World Bank and IMF employees, though the neighborhood does include a development with affordable housing. Although Bannockburn has access to bus transportation, it is largely a car-dependent neighborhood.

2. Who started the village and how did it all begin?
NAN was stimulated by a listserv message sent by someone who had knee surgery and whose husband had hip surgery. The person commented that the couple had one good leg between them, and though they wanted to be home, they thought they would have to recuperate in a rehabilitation facility after their surgeries. Instead, neighbors brought them food, attended to household and yard chores, and drove them to appointments. The sender inquired whether the community might formalize a group to help neighbors in similar situations. Another neighbor responded, floated the idea on the listserv, called a meeting for interested people, and NAN was born. Much early discussion focused on vision and mission.
3. What was the year of your launch?
NAN began in late 2008 and was incorporated and became a 501C3 in early 2009.

4. What is your governance structure?
NAN is governed by a Board of Directors and its officers: President, VP/Treasurer, and Secretary. Initially there were seven people on the Board, but currently there are nine. The Board was increased to involve more community members in NAN who would be knowledgeable about the organization and be prepared (and motivated) to become officers or leaders of projects activities.

NAN is an all-volunteer, non-membership organization. Volunteers and service recipients may be any age, but the focus is on older adults who want to remain in their homes.

Block Coordinators (BCs) are the eyes and ears of each block. They should be the first point of contact for service requests and they should contact volunteers to fill requests for services. In fact, once service users make contact with volunteers, they tend to call them directly to arrange for assistance. This confounds data on service requests and use. There is a coordinator of BCs and volunteers who does a terrific job of tracking requests, making sure they are filled, coming up with ideas for activities, and strengthening our role.

5. What services do you provide?
Like almost all villages, NAN has a longer list of volunteers than of people who request services. Providing services has ups and downs—there is, of course, greater need when several people at one time have surgery, get chemotherapy, enroll in classes, or have meetings to attend.

Transportation is the most frequently requested service. We encourage residents to take advantage of volunteer drivers to go to recreation facilities, classes, etc. and medical appointments. Our next most frequently requested service is social visiting and household chores. Older people often want someone to advise them on whether they need a professional electrician or plumber, or whether their issue has a simple solution that a neighbor can handle. Also, they may request that a neighbor be in the house with them when a service person is there. Younger families may need emergency child-care or elder-care or advice that a more experienced person can provide. All ages may be involved in borrowing and lending equipment, e.g. camping gear, baby gear, invalid supplies, books, etc.

In addition to providing direct services, NAN sponsors social/educational programs. Some of these events are independent of other community activities, and some are jointly sponsored with other neighborhood organizations or with neighboring villages. We are fortunate in that the original golf course clubhouse functions as our neighborhood clubhouse and is available to us at no cost for community activities. We sponsor or co-sponsor such things as NAN night at our spring show, ice-cream socials, sing-alongs, talks about aging-related topics, author talks, current event talks, museum visits, summer water exercises at our neighborhood pool, and a Wise Elder program (a program that matches high school students with older adults to document personal histories) among other activities. The Wise Elder program involves five or six elders and an equal number of high school students per session. Our Water exercise, twice weekly, attracts about 10 people per session. Generally, about five or six people request transportation during a
given time period. Numbers and individuals change as needs change. We record about four rides each week when there are no crises, but our residents also can call volunteers directly when they need something, e.g. a ride, shopping, help at home. Volunteers also visit older people who have moved to assisted living or nursing care facilities.

6. What if any fees are involved?
NAN is all-volunteer. There are no fees.

7. What are your most significant successes and challenges?
NAN is aware of and is addressing the need for succession planning. The Board has evolved and grown since NAN began, and new blood is sought whenever a term expires. However, some active volunteers do not want to commit to Board membership.

Some neighbors have told the Board that they think more people would request services if NAN charged or had a set fee. The Board decided that it wants to serve everyone, and that they preferred the all-volunteer, no-fee model. However, we do accept donations. The number of service requests is low in relation to the number of volunteers who can provide assistance.

Successes include support from the community and recognition that NAN has a voice in Bannockburn. Sunday series programs draw participants and are successful. We also are please about our ability to fill requests for services and at times help neighboring villages.

NAN is becoming recognized as a resource for information and consultation on problems related to aging. Although we anticipated being an information resource, we are getting an increasing number of requests for consultation. Being able to fulfill these is another success.

We have had several training sessions for our volunteers, developed volunteer guidelines, and hold periodic appreciation events for our block coordinators and volunteers.

Chevy Chase at Home
Membership, dues-based village serving several townships
chevychaseathome.org

1. Who started the village and how did it all begin?
Naomi Kaminsky and Joan Urban, who are neighbors, walked their dogs together. One day during their walk, they were discussing Beacon Hill Village and said to each other, "Why don't we organize a village in Chevy Chase?" They posted messages on neighborhood listservs seeking other interested persons and formed an organizing committee from those who responded.

2. How long did it take you to launch?
It was slightly less than 2 years from the time of the initial organizing meetings until CC@ H started providing services to members.
3. In what year did you launch?

Our launch kickoff event took place on November 14, 2010. We started providing services on January 15, 2011.

4. What is your governance structure?

CC@H has a Board of Directors (currently with 13 members) that sets policy. It has an Executive Committee that is comprised of the President, Vice President, Treasurer, Secretary; if either the Treasurer or the Secretary is not a Board Member, an additional Director is designated by the Board.

5. What is the size of your village (both geographic coverage and number of members and volunteers)? What services do you offer?

Geographically our service area includes the municipalities of Chevy Chase Village, the Town of Chevy Chase, Section 3 of the Village of Chevy Chase, the Village of Chevy Chase Section 5 and the Village of Martin’s Additions, along with the unincorporated areas of Rollingwood and the Old Hamlet. (Our service area is bounded by East-West Highway, Beach Drive, Western Avenue, and Wisconsin Avenue)

We currently have 144 households that belong (60 as Full Members and 84 as Associate Members). These households include 257 individuals.

We have trained over 110 people to be volunteers and approximately 50 of them are active. In addition, we have five working committees, comprised of 35 individuals. (Some of our volunteers are also committee members.)

Full Members receive the following special in-home volunteer-provided services:

- Transportation to medical appointments, grocery stores, physical therapy, and more;
- Household assistance such as putting out recycling bins, changing smoke detector batteries and light bulbs, fixing dripping faucets, decluttering and organizing their belongings;
- In-home free notary service;
- Technical aid and advice on smart phones, tablets and computers;
- Home visits to provide relief breaks for household caregivers;
- Relevant information about home-care agencies, provided by knowledgeable volunteers; and
- “Storm Buddies,” a special friendly visit and assistance during emergencies.
All Members, including Associate Members, receive the following:

- Access to a short list of home-care agencies evaluated by knowledgeable volunteers;
- Access to neighbor-recommended home service professionals, including contractors, plumbers, electricians, roofers, heating and air conditioning experts, snow removal resources, gardeners, and home safety experts;
- Educational programs and social events to learn new skills, improve technical competence, discuss ideas and make new friends;
- Lectures featuring experts on such subjects as: the future of Social Security; long-distance care giving and other family dilemmas; financial management; vision, hearing and balance problems; and professional care giving for older adult;
- Discounts on geriatric care consultation from professional care managers through our nonprofit partners at Iona Senior Services and the Jewish Social Service Agency;
- Participation in member-led groups: walking, knitting, memoir writing, and more;
- Discounted classes, such as: Gentle Pilates; balance; Zumba; and tech classes;
- Special lunches at local restaurants at reduced prices;
- CC@ H’s newsletter and, for those with computers, e-mail event bulletins;
- Again for those with computers, access to a member listserv to share information with other members via the Internet; and
- We will soon be adding medical note-taking to the services we offer Full Members.

6. How many service requests do you fill a month?

About 70

7. Are there any fees involved? How much?

We charge $500 per year for Full Family Memberships (for households with more than one person), $400 per year for Full Individual Memberships (only available for people living alone), and $250 for Associate Memberships. Of the Associate Membership fee, $200 is tax-deductible.

8. What are you most significant successes? Challenges?
Since our launch, we expanded our original service area to include Rollingwood and the Old Hamlet. We have seen a steady increase in membership and have continued to gain volunteers. We have expanded our services and programs to meet member needs.

Responding to member requests and community support, we continue to provide interesting educational programs open and free to the public. We also offer exercise and technology classes conducted by professionals from which we take an administrative fee; in doing so we have created a sustainable model to continue providing these activities. We created a wonderful volunteer training program and training manual and offer an open invitation to other area villages to participate. More than a dozen villages in formation have taken advantage of this offer.

In 2014, we received the 2014 Montgomery Serves Award for community service by a group.

As for challenges, very soon, all of our original Board of Directors members will have reached their term limits, and many of our committee members have served continuously since our launch or shortly thereafter. Therefore, leadership renewal is a critical issue for us. In addition, we have the continuing challenge of raising enough money to pay our costs—a challenge we have thus far been able to meet although our membership fees only cover about 60% of our expenses. Non-profits, like CC@ H, that operate in affluent communities, have a special challenge, as they are less likely to receive grant monies than those in poorer areas. Another challenge is determining whether or not to expand our service area. We don’t like to say no to people outside the area who have expressed an interest in becoming members—they can become Friends of Chevy Chase At Home and participate in many of our activities. However, we will only extend our boundaries to adjacent areas, and only if we have evidence that we are likely to get a significant number of new members and new volunteers.

East County Senior Village
Membership, non-dues based village

1. Describe your village community

The East County Village Seniors is located in the East County Community Center, Silver Spring. We are still a budding village consisting of seniors:

- Most are over 60 years old, but we believe the average age is about 70;
- All are retirees, although a few work part-time;
- Incomes are varied considering some have been retired for many years and live on Social Security and savings;
- All have a formal education—some are college educated; and

The group is racially and ethnically diverse with an eclectic mix of professions. Who started the

2. village and how did it all begin?

Sylvia Saunders, the author/writer, started the group with two objectives: 1) getting the EC Senior Fit Group interested in using services provided by youth and/or professionals to help us live safely and comfortably in our own homes (i.e., aging in place); 2) and bringing some of the Holy Cross health and wellness classes to the community center.
Initially, the idea was to use high school kids to help us with yard work, snow shoveling, and little odd jobs around our homes for a small fee. But, when I found out kids were not available in neighborhoods to do those jobs, I contacted Lanita Whitehurst (IMPACT of Silver Spring—a community organizing nonprofit), whom I had met during one of the community-based projects; she put me in contact with Pazit Aviv, and the two of them introduced me to villages and their purposes. We tried assembling a few interested youths with the seniors to see if there was a collaborative effort, but the young men were so inexperienced and all lived in the Briggs Chaney area, it just wasn't feasible for seniors who lived as far away as Calverton, Colesville, and Hyattsville. The alternative solution to finding help was to establish a list or directory of dependable, reliable, and honest professional service providers—used and vetted by senior members—who were interested in giving senior discounts or reduced fees for their services.

The second objective is to bring more health and wellness classes to East County rather than travelling downtown and having to pay to park. One of the members has taken over responsibility for developing the directory. Although the directory is not yet ready, there are several providers from different professions who we can refer at this time.

1. **What was the year of the launch?**
Planning efforts begun in February 2015. There is a lot of interest, but so many people just don’t have the time because of schedule conflicts. We have had planning meeting monthly as well as several health and wellness events. One of our biggest challenge is recruiting people. I have received several offers from people around the area belonging to faith-based organizations who wish to partner.

2. **What is your governance structure?**
We have incorporated as a nonprofit and have no plans to charge fees/dues at this time. We have a small board and a group of people who attend the planning meeting. Our current goal is to recruit more people to our village.

3. **What is the size of your village?**
When the village concept was first presented, the intent was to include all seniors in East County from and to wherever its boundaries spread as long as its membership didn’t infringe upon any other village. As far as we know, it doesn’t. People from White Oak, Colesville, and Prince Georges’ County, Hyattsville, and Calverton areas attend meetings and classes because they attend the Senior Fit Class. At this time, we have a roster of 40, not including our honorary members.

4. **What services do you provide?**
As stated previously, we offer only access to a list of professional service providers and health and wellness classes. All are free at this time. There will never be a charge for directory access, which is available online or via phone. Some classes may involve cost, but only because the instructor charges a fee.

5. **What are your successes and challenges?**
Our only success so far is that we got started, which we can attribute to the support we’ve received from Lanita and Pazit, which in turn led to an increased interest from members/participants and the development of the directory.

The most significant challenge is getting folks to come to meetings and classes. We also need more support for the service provider directory; only a few people have submitted names.

**Foggy Bottom West End Village**
Membership, dues-based village that serves a large urban neighborhood  
[www.fbwevillage.org](http://www.fbwevillage.org)

1. Describe your village community (urban/suburban, basic demographics, e.g. age, income, education. level of diversity.)

District of Columbia (urban)

Population (Figures taken from 2010 census for 20037 zip code)

- Total Number: 14,600
- 50 and over: 3,000 (20%)
- 55 and over: 75% live alone
- Income: Approximately one-third under $50,000 and one-third over $200K
- Education (>25): 85% have BA or higher; over 50% have graduate/professional degrees
- Race (>65): African American (6%) Asian (4.5%) Hispanic (6.4%)

2. Who started the village and how did it all begin?

Spring 2011:
- First monthly meeting of Interim Aging in Place Board, with 10 members to represent various parts of the neighborhood; outgrowth of faith community initiative to identify resources for seniors and a prior effort at apartment complex to create internal village.
- Met with DC active villages and reviewed census data to determine feasibility.

Summer 2011:
- Foggy Bottom Association adopted the FB/WE Aging In Place project as a Special Committee allowing acceptance of charitable donations per Fiscal Sponsorship Agreement.
- Goals of interim Board to determine community interest and establish permanent Board if advised.
Fall 2011:
- Foggy Bottom West End Village name adopted.
- Survey circulated over six weeks to FBWE residents in Foggy Bottom/ West End to determine interest in the Village (willingness to join / pay a fee/ volunteer).
- Interim Board adopted paid staff village model, no age minimum.
- Attended first Washington Area Villages Exchange meeting.
- Village leaders met with DC Office on Aging; Mayor supports villages in every ward.
- Interest survey results summarized showing substantial interest in a village.

Winter 2012:
- Held first community-wide meeting with FBA to discuss survey results, next steps, and presentations from other villages; more than 100 people attended.

Spring 2012:
- Established web site on FBA; Facebook and Twitter accounts.

Summer 2012:
- Issued Second Community Meeting report on village progress; distributed needs survey, sought donations. Circulated volunteer interest survey.

Fall 2012:
- Established membership categories (standard/ social/ 3-year charter/ reduced fee).
- Needs survey showed four primary interests:
  - Unexpected needs
  - Social and Educational events
  - Transportation for health care
  - Computer/technical assistance
- Began membership recruitment drive seeking 100 pledges.
- In 4 months, obtained 62 pledges from twice-weekly apartment building receptions attended by 120 people, 250 invitees plus eight requests for reduced fee membership.
- Village logo and tag line adopted.

Winter 2013:
- Village incorporated and by-laws adopted; permanent Board (11) established;
- Web site launched www.fbwevillage.org;
- Bloomberg news piece on FBWEV:
- Village People: Community Networks Help Boomers 'Age in Place';
- Board retreat to review / assess future activities, set launch date Oct. 1, 2013;
- First computer tech assistance available to pledged members.

Spring 2013:
• Foggy Bottom Association Defense and Improvement Corporation grants $40,000 to FBWEV to fund a volunteer coordinator position and subsidize memberships;
• Board purchased liability insurance for Directors and volunteers;
• Filed 501(c)(3) application with IRS;
• Party held to celebrate pledged members, review planned programs; seek membership dues;
• Began “soft launch” by providing monthly programs and weekly coffees;
• Held village Board annual meeting; officers elected; and
• The Foggy Bottom Current featured front page article on FBWEV and other villages.

Summer 2013:
• Memberships from 90 people ages 44 – 95;
• Membership and volunteer recruitment continue;
• Executive Director hired.

October 1, 2013:
• Launch of village’s full services

3. How long did it take you to launch?
2-1/2 years

4. What was the year of your launch?
2013

5. What is your governance structure?
• Independent 501(c)(3) with Board of Directors and three standing committees (programs, membership, development); Board members serve 3-year terms and officers elected at annual meeting.
• Managed by Executive Committee (Board officers, Exec Director, ex-officio, program and membership committee chairs as non-voting advisors).
• Staff: Executive Director supervised by President of Board.

6. What is the size of your village?

FBWEV’s borders mirror those of the ANC2A that include Foggy Bottom West End. Area is equal to zip code 20037. FBWEV also encompasses George Washington University.
http://www.fbwevillage.org/join/village-map/

As of June 30, 2015: 160 members in 132 memberships
75 volunteers, including 60% of whom are also members

7. How many service requests do you fill each month?
Average - 35; number is increasing as membership expands and members’ needs increase

8. Are there any fees involved? How much?

Annual membership fees for both social and standard memberships are $600 for an individual and $900 for a household. Social memberships are tax deductible, except for $50. Three-year standard memberships are available at $1500 for an individual and $2400 per household (a $300 savings). Reduced-fee memberships for individuals with annual income under $48,000 is $100; memberships for households with incomes under $55,000 are $150. [Note: Executive Director is authorized to use discretion to waive fee or consider waiving the fee for higher income earners based on individual circumstances.]

9. What are you most significant successes? Challenges?

Successful:
- Growth: Grew 60% in 18 months after opening with 100 members
- Diverse membership (age/ LGBT/ income)
  Market penetration exceeds 8% among population over age 65
- Impact: Establishing sense of community--most frequent comment from villagers
  95% renewal rate after first year

  Satisfaction survey:
  - 100% of our members either strongly agreed or agreed that FBWEV services and programs have met their needs and expectations.
  - 93% of our members were extremely or very satisfied with their membership.
  - 99% of our members would definitely or probably recommend the village to a friend or neighbor.
  - 98% of our members believe that FBWEV is enhancing their independence.
- Spring 2015: Selected to participate in University of California Berkeley national feasibility study.
- Caregiver support group established w/in village in first year.
- Support: Community groups are providing a variety of supports (FBA/ ANC/ FB Defense Trust), including $60,000 for volunteer coordinator / reduced fee subsidies and $100,000 to use for office space.
- Providing reduced-fee memberships from outset, have met goal 20% memberships with funds donated by members, FB Trust and private foundation.
- Participation in DC’s Age Friendly initiative.
- Being Noticed:
  - Health practitioners and providers are seeking FBWEV’s participation in a variety of wellness initiatives.
Employers seek information and in person presentations
Media attention (local/ national/ international)

Challenges:

- Physical location unique:
  - A relatively new “residential” neighborhood developed since 1950’s industries;
  - No central business district;
  - No option to expand geographically;
  - More than 60 high rise buildings that “silo” residents; and
  - Historic District: 200 attached row houses/alleys -- different dynamic than high-rise living.

- Local institutions limited
  - Numerous buildings in neighborhood of national or international organizations;
  - Growth of GWU -- student body and infrastructure development/ redevelopment;
  - Limited spaces for community gathering;
  - No recreation or senior centers (exception one HUD-subsidized residence for seniors);
  - All but one local church’s members reside primarily outside neighborhood; and
  - One elementary/middle school and associated HS draw from all of DC.

- Sustainability - Demographics
  - The largest untapped demographic is 50-64 -- those most likely to be “not ready yet.”
  - A significant number of current members are 85 or older with increasing needs, especially those with mobility/vision/hearing issues.
  - It is difficult to identify individuals with needs but reduced income who don’t often self-identify
  - There is a need to develop outreach techniques to diverse populations.
  - There is a desire to promote intergenerational contacts.

- Capacity--a need for:
  - Expanding the Board to capture areas of expertise not represented;
  - Ongoing fundraising demands; and
  - Ensuring sufficient resources (including staff, volunteers) to meet members’ needs and desire to provide effective and innovative services.

Mount Vernon At Home
Membership, dues-based village serving a large suburban area
www.mountvernonathome.org

1. Describe your village community
   - Mount Vernon At Home was the first village in Virginia.
Suburban village is located on 14 square miles in the Mount Vernon Area of Fairfax County.
- Average age of member is 82.
- Community is primarily all middle class, retired Federal employees (highly educated).
- There is an endowment program for lower income households.
- Charter members were homeowners in Hollin Hills section of Alexandria.

2. What year did you launch?

3. What is your governance structure?
Governed by Board of Directors (17), comprised of members and community partners; By-laws

4. What is the size of your village?
- Members, representing 138 households: 180
- Volunteers: 85
- Full time staff: 2; several part-time volunteer staff

5. How many service request do you fill each month?
One hundred and ten average monthly requests

5. Are there any fees involved?
Member fees: $700 for single household, $950.00 for two or more, no social membership

6. What are your greatest challenges?
Challenges: Volunteer recruitment, membership “churn,” (“I’m not ready yet”), fundraising

Olney Home for Life
Non-membership, non-dues village serving a large suburban area
www.olneyhomeforlife.org

1. Describe your village community
Olney Home For Life, Inc. (OHFL) serves seniors (60+) in the Olney, Sandy Spring, Ashton, and Brookeville areas. The area is both suburban and rural. OHFL's service area is home to approximately 4,000 seniors, of which 6.5% are below the poverty level. Our area is expected to have the highest senior percentage growth rate in Montgomery County for the near future. We are fortunate to be served by the MedStar Montgomery Medical Center. We have a partnership with the MedStar Cancer Center to support the transportation needs of their senior patients, even if they reside outside our service area.
2. Who started the village and how did it all begin?

Three community members who were active volunteers in senior programs and with a knowledge of aging in place began discussions in 2011 to determine how best to help area seniors to remain in their homes as long as they wished. Area organizations and other interested community members were engaged and worked with the group that then founded Olney Home For Life (OHFL) as a village to provide senior services.

3. How long did it take you to launch?
It took one year of development.

4. Year of launch?
2012

5. What is governance/operations structure? (staff, office, how services and programs are delivered)

OHFL is managed by a Board whose members also develop and direct programs that are delivered by a volunteer staff. While we have a small donated office space in a local business, we are basically a virtual organization with our volunteers and Board members working from their homes.

7. What is the size of your village

OHFL provides services to seniors 60+ residing in the Olney area, which includes zip codes 20830, 20833, 20860, and 20861. The only membership requirements are that the member be 60+ years old and live in our area and/or be a patient of the MedStar Cancer Center. We consider all individuals who meet these criteria to be members.

6. What Services do you offer?
Services include:

- Transportation: OHFL’s transportation services help seniors get to the hospital, the store, medical appointments, and social gatherings within about a 10 to 15-mile radius of downtown Olney.

- Friendly Calls: OHFL’s Friendly Calls Program provides free, friendly phone calls daily to Olney area seniors. For people living alone, the service provides at least one brief social contact during the day. For others, the phone call provides reassurance that someone has checked in on them that day. Please note that this is a social call only and is not a substitute for a telemedicine provider, medical alert, or counseling services.

- Friendly Visits: OHFL’s Friendly Visits Program is conducted in partnership with the Mental Health Association of Montgomery County. It provides free, friendly visits on a weekly basis to seniors, offering friendship and support to adults who may be home-bound or isolated because of physical concerns and chronic illness.
9. How many service requests do you fill a month (estimate is OK)?
We fulfill approximately 115 requests per month.

10. Are there any fees involved?
There are no fees for OHFL services

11. What are you most significant successes? Challenges?

OHFL Successes:
- A major success for OHFL is the excellent relationship we have with the community. Our unique partnership with MedStar Montgomery has contributed significantly to our growth. We are designing a new senior technology program with the Olney Library and JCA, and we have recently established working relationships with Sandy Spring Museum and the Longwood Recreation Center to work together on programs.
- Our transportation service is another outstanding success. Not only are we one of the largest village transporters in Montgomery County but we have been able to fill over 95% of the requests with on-time pickup and delivery at nearly 100%. Approximately 90% of these requests are for medical appointments, contributing to the enhancement of health for seniors in the area.
- We successfully piloted Friendly Calling in 2014 and launched a full scale program in 2015

Challenges
We have two primary challenges:
- Recruiting volunteers is a continuous challenge and to some extent limits the growth of our services. Our volunteers are extremely dedicated, and for that we are thankful.
- The second challenge is the large size of our service area. Where a number of villages use local/neighbor events to build awareness, the size of our service area limits the use of these techniques.

Silver Spring Village
Membership, dues-based village serving a large urban neighborhood
www.silverspringvillage.org

1. Describe your village community
Our village’s service area (Silver Spring, ZIP code 20910, population 37,445) is an economically and ethnically diverse community. Approximately 13% of the population (3,700 people) is 65+ years of age; 2:1 female, and almost equally split between living in owner-occupied dwellings
and rental units. In this area, approximately 14% of individuals age 65+ live below the poverty level (countywide comparison is 6.5%); median household income for our ZIP code is $77,302 compared to $96,985 for the entire county. Ethnically, approximately 54% of the 20910 population is Caucasian; 30% African-American; 7% Asian; and 11% of Hispanic origin. We welcome all (including all ages) as members and volunteers.

Our service area is also very diverse in terms of housing. It includes the commercial core of downtown Silver Spring, with numerous apartment and condominium buildings, townhouse developments, and nearby neighborhoods with both large and small single-family homes.

2. Who started the village and how did it all begin?
Two long-time residents of the community, Roberta Gosier and Martine Brizius, who knew about the village concept and understood the needs of seniors, were convinced that the village model was well-suited to local needs. They announced their interest on a “Kojo in Your Community” show in 2010. Soon after, a somewhat larger group started holding information sessions. About ten people began holding regular planning meetings. We started building a list of people who had expressed interest and sending out occasional “updates” via email. We collected a small amount of money (needed for legal filings) and found a pro bono attorney to help with our 501(c)(3) application, bylaws, etc.

After 3 years of work by the planning committee, Silver Spring Village, Inc. had incorporated, developed bylaws, elected a Board of Directors and officers, obtained 501(c)(3) status, started fundraising, developed communications mechanisms, and built a long list of "interested persons."
In summer 2013, we began enrolling and training volunteers, recruited initial members, and on September 29, 2013, the Village officially opened and started providing direct services to our members.

3. How long did it take you to launch?
More than 3 years.

4. Year of launch?
2013

5. What is your governance structure?
We have a self-perpetuating Board of Directors with four officers who constitute the Executive Committee. We hired an executive director in 2014.

6. What is the size of the village?
Zip code 20910. As of June 20 2015, we have 103 members and 75 volunteers.

7. What services do you offer?
We have a wide range of services that can be done by non-professionals. Examples of “direct service” for full members: driving, shopping, visiting, small household repairs, de-cluttering, gardening help, pet care, preparing occasional meals, etc. Examples of social and educational
programs for all our members: book group, current events discussions, presentations (e.g., fire safety, social media, ballet), trips to concerts and movies, restaurant outings, etc.

8. How many service requests do you fill a month (estimate is OK)?
May 2015 hours: 1015
Office Phones: 120 hours by 13 volunteers
Board and Committee Hours: 695
Direct Assistance to members: 200 hours for 22 members by 33 volunteers
(Assistance includes 23 rides for eight members provided by nine volunteers)

9. Are there any fees involved?
Yes. Full Members: $350 individual, $450 couple; Associate Members (access to events but not volunteer services): $150 individual, $250 couple

10. What are your most significant successes?
- Received Montgomery County funding two years in a row (with significant increase in year two)
- Recruited an awesome Executive Director
- Established a scholarship program (2 members to date, with 2 more in the pipeline)
- Increased diversity of Board and membership (Preliminary data from our member survey indicate at least 13% of members are non-white.)

11. Challenges?
- We want to
  - significantly increase attendance at village events.
  - We want to make the vetted vendors/ discounts a valued part of village membership. (Too few of our members have used these benefits.)
  - Get more members to visit our website for news, calendar, listserv, etc.
  - Get more volunteers to help with committee work, such as programs, member recruiting, development, finances, etc. We have plenty of volunteers for direct services for seniors.
1. **Describe your village community**
The VTP serves the entire city of Takoma Park, MD. It is a mostly a suburban community of 17,000 residents. Takoma Park is known for its diversity and is representative of the trends observed in Montgomery County. The median household income is $69,450, and the poverty rate is 17.2%. Twelve percent of the city residents are over age 65, with 14.6% of them living below poverty, which is one of the highest poverty rates for seniors in the County. Thirty-five percent of the city’s population is black and 14.5% is Latino. More than 3,000 households reside in rental units. Takoma Park has high housing costs but is unique in its rent control measures and the availability of affordable housing for older adults. (There are two subsidies housing complexes in the city).

2. **Who started the village and how did it all begin?**
The village began as the brain child of Wolfgang and Gertrude Mergner, long-time community activists in the city. They already were working with aging and disabled residents of the city and realized a gap in services. They initiated a monthly meeting called “Seniors and Those Who Care for Them” in 2011, and the program has been ongoing since then, with high rates of participation from local low-income residents. Wolfgang worked hard to identify local leaders in the different neighborhood with varying levels of success. Some neighborhoods already were cohesive and doing much for their neighbors, while others had no activity. Wolfgang organized village planning meetings with representatives from all the neighborhoods.

Initially the planning group thought to operate in a hub-and-spoke model and let the neighborhood handle their local social activities and neighbor-helping-neighbors support. However, it became clear after a year that there was a need for a city-wide group able to serve all aging and disabled members, regardless of where they live in the city.

The planning group experienced high turnover until it coalesced around a core group of six people; this core became the formal Board once the village became a nonprofit entity. The planning group (and later on the Board) receive support from city council member Seth Grimes, as well as from a local nonprofit called Community Health Empowerment Education Research (CHEER), which served as the fiscal agent to the village until it received its nonprofit status. Adventist Community Services have also been extremely supportive and has contributed greatly to the village.

3. **How long did it take you to launch?**
It took 3 years to launch

4. **Year of launch?**
May 2014
5. What is governance/operations structure? (Staff, office, how services and programs are delivered)
The village is managed by a working Board of nine members. Each Board member is also an active member in one of the committees (communications, fundraising, membership, events, executive, volunteers). There is no hired staff or office space. The city offers free meeting spaces for Board meetings and social gathering. The city also has a staff person that partners with the village on different projects.

7. What is the size of the village?
The village covers the zip code of 20912. It encompasses the entire city of Takoma Park with a very small addition from Silver Spring, also in the 20912 zip code. The village has 80 members and 30 volunteers.

8. What services do you offer?
The village partnered with VillageRides to offer volunteer transportation and utilizes this programs' different services. The village also partners with the Friendly Visitor program to offer that service to city residents. Currently the village is seeking to expand its volunteer services to residents. The village also continues to offer its monthly meetings with speakers on various topics, along with refreshments. The village receives calls from individuals and refers them to known resources they seek, such as healthcare, food, financial help, aging and disability services support, and more)

9. How many service requests do you fill a month?
On average, the village fills 50 ride requests.

10. Are there any fees involved? How much?
The village asks for $10 annual contribution from each member. If someone has a problem paying that, the village waives that fee.

11. What are you most significant successes?
Successes:
- Advocating for a city staff person who will primarily work with aging and disabled residents
- Consistently offering monthly meeting for 3 years
- Reaching out to low-income residents in local apartment buildings
- Reaching out to African American residents in the city
- Securing grants from city and county
- Launching the our volunteer rides program with Village Rides and the Friendly Visitor program
- Creating a public service ad (PSA) to recruit volunteer drivers in partnership with the city. The PSA is now available for use by all County villages wishing to use it.
- Recruiting 30 members in the first 3 months of operations.

Challenges:
- Initially, deciding on the nature and function of the village. Vast disagreements on how to develop the village caused many delays.
• Retaining active Board members who would do the work needed to sustain the village
• Getting the word out to isolated seniors
• Engaging the neighborhoods to send representatives to the Board meetings
• Finding volunteers with the time to follow through. Many people signed up but later on say they do not have time to work for the village.

**Wyngate Neighbors Helping Neighbors (WNHN)**
A non-membership, non-dues villages serving one civic association area
[wnhn.org](http://wnhn.org)

2. Describe your village community

• Suburban
• Data per 2010 Decennial Census (tracts 7045.02 + 7045.03)
  - 33% residents age 24 and under
  - 53% residents age 25 to 64
  - 14% residents age 65 and over
• Median family income: $206,000
• Demographics:
  - White: 84%
  - Asian: 9%
  - Black or African American: 3%
  - Multi-race: 3%
  - Other: 1%
• We assume at least one adult per household holds a bachelor’s degree (or higher)

3. Who started the village and how did it all begin?

In Fall 2013, the Wyngate Citizens Association’s (WCA) President conducted a poll of potential interest in a variety of activities. “Pairing senior citizens with other residents willing to check on them” was the activity in which residents were most interested and willing to participate. An organizing committee was formed, including a resident also on the Montgomery County Commission on Aging, who introduced the village concept to the group. We also invited the president of one of the BCC villages to a meeting to describe her village’s experiences.

The initial “pairing” proposal expanded to become a no-fee, all-volunteer, intergenerational village, Wyngate Neighbors Helping Neighbors, within the WCA’s geographical boundaries. WNHN’s focus will be arranging for neighborly assistance and social activities.
In October, 2014, WNHN invited (via door-to-door flyer and listerv notices) the Wyngate community to a meeting at the local elementary school. Eighty residents participated, most of whom completed a form indicating interest in volunteering, the types of services that should be offered, and whether or not they would like to be part of the WNHN organizing committee.

In December 2014, we held a meeting of a proposed Steering Committee. More than 20 people attended and volunteered for leadership and member roles on five teams. We launched in December 2015.

4. How long did it take you to launch?

In Spring 2015, WNHN incorporated, was certified as a 501(c) (3) nonprofit organization, and offered its first social activity – a weekly walking group.

In Summer 2015, WNHN partnered with VillageRides.

5. Year of launch?
Neighborly assistance, including ride assistance launched in December 2015.

6. What is your governance structure?

WNHN has five teams of between two and seven members, each focused on a specific area: Communications & Community Outreach; Volunteer & Requester Management; Volunteer Orientation; Social Activities; and Financial Resources.

WNHN’s Steering Committee has 15 members: the two lead members of each team; a records manager; a volunteers’ representative; a requesters’ representative; a consultant at large; and Steering Committee lead. In addition, there are two Hub Coordinators who volunteer to connect resident requests with volunteers.

Upon final approval of WNHN’s bylaws, WNHN will also have a Board of Directors, including WNHN’s Officers. The Board of Directors will provide overall direction for WNHN, promote the effectiveness of its committees, manage WNHN’s finances, and assure its compliance with the law. The Steering Committee will continue to develop and decide on operational matters, including implementation, evaluation, and modifications to WNHN’s assistance processes and social activities.

7. What is the size of your village?

WNHN will serve the 1400 households spread across 200 acres within its North Bethesda borders, along with residents of adjoining neighborhoods who are not served by a village, on a case-by-case basis. To date, about 25 residents have helped organize WNHN and 125 others have expressed interest in volunteering once operations begin.

8. What do you offer?
Occasional assistance including, but not limited to:

- Transport to medical appointments, grocery store, bank, etc.;
- Pick-up of prescriptions or a few groceries;
- Phone check-ins (during bad weather, power outages);
- Friendly visits;
- Keeping company during commercial service calls;
- Delivering meals or assisting in preparing meals;
- Housekeeping (vacuuming, tidying, laundry);
- Computer/cable TV help (simple problem solving);
- Help with bill paying, completing forms;
- Babysitting, after-school care, or parents’ helper;
- Yard maintenance (snow/leaves/gardening/mowing);
- Pet or plant care;
- Moving trash cans, collecting newspapers;
  Checking on house while away; and
- Opportunities for social interaction.

9. How many service requests do you fill a month (estimate is OK)
N/A yet

10. Are there any fees involved? How much?
No fees

10. What are you most significant successes? Challenges?

Significant success:
The number of residents who have helped organize WNHN or who have expressed interest in volunteering and have provided their contact information has been encouraging. Apparently, WNHN has projected itself well.

Challenges:

- Publicizing WNHN to households that are not connected to either our neighborhood’s or schools’ listservs. These harder-to-reach residents may include those more likely to benefit from WNHN assistance and social activities.
- Offering assistance and social activities that will intentionally support an intergenerational village. By intergenerational, we mean the different generations of adults--especially, identifying and offering services that older adults can provide to younger adult generations/families.