

## **Aging in Place Committee**

### **Summer Study: Senior Villages in Montgomery County**

**Summer 2013**

#### **Executive Summary**

##### **Goals and Objectives**

The Commission on Aging's Summer Study of Senior Villages in Montgomery County:

- Identified current and emerging Senior Villages in Montgomery County;
- Reviewed Village websites; and
- Surveyed and interviewed all operating and emerging Villages in the County.

The results of the 2013 Summer Study Survey are intended to inform the Commission on Aging about the current status of Villages in the County, their successes, failures, challenges and needs. The study is further intended to: 1) educate the Commission about the needs of seniors in diverse and lower income communities; 2) whether or not the Village concept is viable and sustainable within these communities; and 3) to provide a strong foundation of knowledge about the status of current and emerging Villages for the new, but as yet not hired, County Villages Coordinator.

##### **Findings**

Montgomery County Villages, on average, are planned 1.5 years before they launch. Six of the 15 Villages are incorporated as non-profit organizations. While most are free-standing, non-membership, no-fee, all volunteer organizations, some are under the auspices of homeowners/neighborhood

associations. Two charge fees and some emerging Villages plan to introduce fees. One Village has paid staff. The leadership of County Villages is over 50 years old, white, and middle to upper income. All Villages have a governance group; a minority have written administrative policies and business plans. All Villages collaborate with external groups to meet needs for space, office services, activities, training and other services.

Transportation is the most requested service and is offered by all operating Villages. It is followed in frequency by social/educational activities and social visiting and phone contacts. Assistance with household chores is another frequently requested service. Most Villages have more volunteers who provide services than requests for services. All Villages have adopted a volunteer first model for provision of services.

The Study Group met with representatives of diverse communities to explore their interest in the Village concept and to learn about the needs of their communities. The representatives described needs of their senior population and barriers to services utilization, e.g. lack of English language proficiency, lack of health insurance, and lack of cultural competence among services providers.

The survey identified commonalities and differences between Montgomery County Villages and a National Overview of Senior Villages. Suggestions about Village needs are addressed to the to-be-hired Village Coordinator.

### **Recommendations to the Commission on Aging**

The Aging in Place Committee recommends that:

- The Commission support the vast majority of Montgomery County's older residents who choose to age in place. One way to do this is to support and assist current, emerging and new Villages in Montgomery County.
- The Commission thank the County Council for approving a Village Coordinator position.

- The DHHS Office on Aging and Disability charge the Village Coordinator to identify reasons for success and failure of efforts to establish Villages in Montgomery County so that emerging Villages can benefit from the experience of others.
- The to-be-hired Village Coordinator meet with the AIPC regularly to discuss ongoing Village-related activities.
- The AIPC continue its outreach activities with diverse communities to explore how best to support aging in place in these communities. This effort might lead to a Summit on Aging in Place in the Community.
- AIPC's agenda during the coming year focus on Villages. The Committee might identify aspects of the Summer Study Report that should be referred to the Village Coordinator for implementation; work with the Village Coordinator on planning for sustainability; identify unanswered questions raised by the Summer Study, e.g. why some Villages operate in isolation and reasons for success and failure.
- The COA recommend AIPC integrate more fully with other COA committees and agencies, specifically the Health and Wellness Committee and the Housing Opportunities Commission. As more people join the "oldest old," transition to integrated services is expected to be increasingly important.
- Since transportation is the number one service requested by older residents associated with Villages, the Village coordinator and mobility manager work together and share information with each other and with the Commission.
- The COA, to communicate with the public about Montgomery County Villages, include information on its website about existing and emerging Villages, e.g. their locations and contact information, and mount a Seniors Today program on County Villages.

**Montgomery County Commission on Aging**  
**Summer Study 2013 – Survey of Senior Villages in Montgomery County,**  
**Maryland**

**Submitted by the Aging in Place Committee**

**Introduction**

***“Villages are community based and operated organizations dedicated to helping residents remain in their homes as they age. Villages accomplish this by organizing and delivering programs and services that allow residents to lead safe, healthy, productive lives in their own homes. Villages provide services through a range of models using fee-based, membership and volunteers.”*** (Memo from Ken Hartman (Director, Montgomery County Regional Services Center) to George Leventhal (Chair, Health and Human Services Committee, Montgomery County Council), dated March 9, 2009).

The purpose of the Commission on Aging’s Summer Study Survey of Senior Villages in Montgomery County, is to document Villages and similar organizations for aging in place and to explore whether the concept is of interest to and feasible for diverse population groups. The information gathered, as well as the expressed concerns of Village leadership form the basis of recommendations to the Commission that will enable it to fulfill its advisory and advocacy roles. This Summer Study summarizes the efforts of the 2013 Aging in Place Summer Study Group.

Over 20 individuals, including COA Commissioners, Montgomery County staff members and individuals from the public, private and nonprofit communities who actively engage with older adults, participated in the Summer Study Group (the “Group”). The Group 1) identified current and emerging Senior Villages in Montgomery County with the help of the Washington Area Villages Exchange and through interviews conducted with current and emerging Villages; 2) performed reviews of existing Village websites; and 3) created a Village survey instrument which relied heavily on survey instruments developed by Andrew Scharlach, Ph.D from the University of California Berkeley and his research team who gave the Group permission to use the instrument. The survey instrument was enhanced by the addition of questions from an interview instrument developed by the Westat research team that is currently studying Villages in Maryland, also with their permission and collaboration.

To accomplish our goal, the Group was divided into teams of two people, each of which arranged in-person survey interviews with representatives from each operating and emerging Village in the County. All operating Villages completed the survey. Telephone conversations were held with one Village that reported no requests for services and another that was unable to generate enough interest in the community to get off the ground.

The results of the 2013 Summer Study Survey are intended to inform the Commission on Aging about the current status of Villages in Montgomery County, their successes and failures and their challenges and needs. The Summer Study is further intended to: 1) educate the Commission and its members regarding the aging needs of diverse and lower income communities; 2) determine whether or not the Village model is viable and sustainable within these communities; and 3) provide a strong foundation of knowledge about the status of current and emerging Villages in

Montgomery County for the new, but as yet unhired Montgomery County Villages Coordinator.

## **Background**

The first formal Village, Beacon Hill, was founded in 2001 by a group of older residents to help one another remain in their own homes and neighborhood for as long as possible. Subsequently, many similar initiatives have come to fruition across the U.S., and more are “emerging” every year. Montgomery County, for example, is home to at least 15 Villages<sup>1</sup>, many currently operating, others preparing to “launch,” and still others in the planning stages. No two Villages are alike; each grows organically depending on the needs and desires of the community it supports, and on the availability of a skilled and committed leadership team. From a review of available literature and information gained from interviews and searches of Village websites, we have determined that the concept of Villages reflects a vision for the future and a passion and commitment to age in place in one’s existing community for as long as possible.

## **Organizational Characteristics**

On average, Villages in Montgomery County spend approximately 1.5 years planning prior to launch. Older adults are actively involved in the planning of their respective Village communities. Six Villages surveyed function as formal organizations (planning to incorporate, incorporated, non-profit or other); six do not. Five Villages have written mission statements. One Village currently operates with paid staff and another has a volunteer Executive Director; all utilize or plan to utilize volunteers. One Village reported a roster of 50 volunteers for 100 members. Volunteers have specific job titles and/or are responsible for specific tasks (service

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<sup>1</sup> Includes one Village that considers itself operational but has received no requests for services and one failed attempt to start a Village. These are included to understand failures as well as successes.

coordinators, volunteer coordinators, communication, outreach, administrative tasks, etc.). All Villages surveyed indicated that a strong core of volunteers among Village members and other residents was very important to Village sustainability.

**Table 1. Number of Villages Indicating Levels of Involvement of Stakeholders in Creating the Village in the Planning Phases**

	Not Involved	Little/Somewhat	Very/Extremely
Older Adults			15
Service Professionals	13	1	1
Other Community Residents	3	6	6
Elected Govt Officials	14	1	

### **Financing, Funding and Fundraising**

All Villages surveyed began the planning process without funding. Four Villages received small grants and/or donations (\$500 to \$4,000) to assist with ramp up. Two Villages have operating budgets. Two are currently charging membership fees, though some of the operating and emerging Villages plan to seek funding from a combination of fees, grants and donations. All Villages intending to charge fees plan to accommodate the needs of lower income members.

### **Community Setting, Member Characteristics and Socio-Economic Status**

Montgomery County Villages serve communities that range in population from approximately 1,600 to 35,000 people in suburban, urban and semi-rural areas. Eight Villages defined their boundaries by zip code. One is an incorporated town and another is a city. Three are neighborhoods. Most

Villages are suburban; one Village considers itself rural. The overwhelming majority of Village members are white, aged 50+ years, own their own homes, are of middle to high income and are economically secure. One emerging Village intends to support the needs of lower income communities within its intended boundaries; one operating Village currently supports the needs of approximately 15 low income individuals living within and just outside the stated boundaries of its Village; neither of these two Villages charges membership fees.

### Services Provided

The top requested service among all Village members is transportation. Approximately 10-15 Village members, on average, request services on a monthly basis. Most Villages maintain volunteer rosters consisting of 12 to 25 volunteers, though one Village has a roster of 50 volunteers to provide transportation. Volunteers deliver services. One Village which contracts with a central phone answering service for 24/7 coverage. One Village maintains a list of member approved service vendors.

**Table 2. Of the Villages providing services, the most common offerings are:**

Service	Offer/Vol	Offer/Refer to Vendor	Plan to Offer	Not Offered	N/A
<b>Transportation</b>	<b>8</b>	<b>1</b>	<b>5</b>		<b>1</b>
<b>Recreation and Social Events</b>	<b>8</b>		<b>3</b>	<b>3</b>	<b>1</b>
<b>Home</b>	<b>8</b>	<b>5<sup>2</sup></b>	<b>3</b>	<b>3</b>	<b>1</b>

<sup>2</sup> Some Villages both provide volunteer services and refer to vendors.



<b>Maintenance</b>					
<b>IT</b>	<b>6</b>		<b>1</b>		<b>1</b>
<b>Exercise</b>	<b>5</b>		<b>1</b>	<b>1</b>	<b>1</b>
<b>Friendly Visits</b>	<b>5</b>		<b>1</b>	<b>1</b>	<b>1</b>
Central phone number to request services	3		1	1	1
Professional Coordination of Services	1	1	1	2	1
Housekeeping	2		1	4	1
Shopping	4	4	6		1
Home Delivered Meals	3			3	1
Congregate Meals	1			5	1
Home Health		1			1
Preventive Health				6	1
Health Advocacy	2			4	1
Other Health				6	1
Disease Mgmt			1	6	1
Reassurance Calls	4		1	2	1
Financial Services		1			1
Employment Assistance				7	1
Volunteer Opps	4		1	2	1
Legal Assistance		1		6	1
Mental Health Services	1			6	1
Benefits Counseling				6	1

## **Governance**

All Villages have a Board and/or Advisory or Steering Committees. Boards or Committees range in size from 5 to 19 people, the majority of whom are Village residents or members.

## **Collaborations**

All Villages collaborate with external groups. The collaborations result in donated offices, meeting or exercise space, printing, marketing, communications and outreach services including columns in Community newsletters, list serves, articles in local papers; volunteer training, and tables at various related events.

## **Summary of Survey Findings**

The Survey indicates that Village models generally correspond to their definition as “self-governing, grassroots, community-based organizations developed to enable people to remain in their homes and communities as they age.”

**Table 4. Summary of key survey findings**

Number of Freestanding Villages	9 of 15
Number of Freestanding Villages with or plan to apply for 501(c) status	7 of 15
Number of Villages Operating as Membership Organizations	5 of 15
Number of No-Fee No Membership Villages	8 of 15
Average Cost of Individual Membership	\$175/yr
Range of Participating Village Members	12 to 200
Number of years in Operation	1 to 5
# Number with at least 1 paid staff person	1
Average Number of Monthly Volunteers	12 to 15

Median Size of Budget	\$5,500
Median \$ of Total Budget from dues/fees	\$4,000
Number Offering/Planning Discounted Membership	9
# Average Number of Member Participants <sup>3</sup> at beginning of 2011	0 to 150
# Average Number of Participants <sup>4</sup> at beginning of 2012	0 to 200
#Number Offering list of Preferred Providers	3
# Number Reporting Advisory Group	14

## **Aging in Place Summer Study Survey of Villages Discussion**

### **Getting Started**

The idea to establish an organization to support aging in place (at home for as long as possible and in the community if more assistance is needed), generally reflects the thinking of an individual or of a small group concerned about their own futures and who want to avoid assisted living and nursing facilities, if possible. The Village founders and leaders that we interviewed told us they shared their concerns and vision with a few friends. They indicated they spent time learning about other Villages, became passionate about aging in place, and developed a strong commitment to make it happen. Many talked with relevant organizations, their own community groups and with County staff. They asserted that spreading the idea, gaining support and identifying and supporting neighbors' needs are critical.

One Village was started when two people active in their citizens' association, aware of their own ages, and recognizing that many other residents were older, recommended to their board that a committee be formed to support

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<sup>3</sup> Range of participants in each Village is 0-150.

<sup>4</sup> Range of participants in each village is 0-200.

older residents. They asked a neighbor to become committee chair. She accepted the challenge, and with the help of the committee, assessed needs by surveying the community and visiting all older residents, informally gaining a sense of their needs and what services might be helpful. She identified several residents who were visually impaired and after discussion with them, was able to get people to read to them and to help with paperwork and transportation.

In another community, a couple was so appreciative of the help they received from neighbors after surgery that they thought a formal system of volunteer help would be a tremendous addition to the community. This individual placed an inquiry on the neighborhood listserv, received a positive response, invited interested people to a meeting and the Village emerged. The individual who started the effort had a vision of how the organization should operate: block coordinators would keep informed of what was going on, on their blocks and volunteers on the block or elsewhere in the community would provide services.

In another area, a resident approached the city council to seek support for a city-wide Village initiative. Some neighborhoods had begun serving seniors and have joined the larger initiative, currently in the planning stage, with meetings every other month. The city has approved funding for a part-time coordinator for two years to assist the Village in becoming operational and self-supporting.

Another group lives in a Continuing Care Retirement Community (CCRC) adjacent to low-income housing. That group is considering forming a Village in which volunteers from their CCRC and the community would provide assistance to those who need it as a way of allowing independent living and delaying a transition to the next level of care within the CCRC.

Most groups in Montgomery County sought information about existing Villages and contacted them. Ken Hartman, Director of the County's BCC

Regional Services Center and his Associate, Karen Thon both provided information and put interested people in touch with others in the County who had started Villages or were in the process of starting them. Ken Hartman organized quarterly meetings to help Villages network. He and Karen also let people know about The Village Blueprint prepared by County resident Leslie Marks and made it available on-line and in hard copy. Their help was invaluable. Since the establishment of the Washington Area Villages Exchange (WAVE) in 2010, operating, emerging Villages, and those thinking about starting Villages networked at quarterly WAVE meetings where they sought and received information, guidance and access to a variety of resources.

## **Organization**

Montgomery County Villages vary in structure and organization. Villages include several models: free-standing or associated with or under the auspices of another organization; membership or non-membership; fee or no fee; staffed or all volunteer.

Sixty percent (9 of 15) of Montgomery County Villages are free-standing while others partner with a parent organization such as a citizens' association or town/city. Among free-standing operating Villages, about half (7 of 15) are incorporated and have applied for or obtained IRS 501(c)(3) status. Among emerging Villages, most plan to incorporate in Maryland and then apply for 501(c)(3) status. All Villages view themselves as not-for-profit organizations, whether or not they are officially designated as such. Obtaining 501(c)(3) tax status allows them to accept donations and in some instances, meet eligibility requirements to apply for grants.

Villages that are committees of or otherwise affiliated with citizens' associations, a town or city, or with another organization are governed by the parent organization's structure and tax status. Some Villages start as affiliates of another organization but plan to become free-standing.

Thirty-three per cent (5 of 15) of Villages (operating and planned) are membership organizations; others are non-membership. Among the 10 operating Villages, eight are no fee non-membership organizations. That is, they serve anyone in their defined geographic area who requests services. Although the focus remains on serving older residents, depending on the Village's mission, services may be provided to residents of any age. Of these no fee, no membership Villages, three are incorporated and nine are not. The three that are incorporated have formally organized and documented Boards with written procedures for voting, election of officers, terms of office, etc. Commenting on the experience of becoming a non-profit corporation, one Village wondered whether or not it was worth the trouble. Some Villages that are unincorporated, no-fee non-membership organizations have lists of older residents though they consider themselves non-membership organizations and will serve any community senior on request. Two Villages in the planning stage envision themselves as no fee, non-membership organizations. Two operating Villages are free-standing, fee-based, membership, and are incorporated as non-profits. Two emerging Villages plan to adopt a fee-based membership model. Membership ranges from just under 200 members for established operating Villages to 12 and 35 for newer Villages.

The two membership fee-based operating Villages are staffed, each by a single part-time or full-time person. Both started with volunteer staff; one now is able to pay one part-time staffer. In the other, the staff is volunterring, though it is anticipated that staff will be paid once the Village is better established. Several Villages begin as all volunteer operations, have membership fees, and plan from the outset to hire staff when they can afford to do so. Other Villages follow an all-volunteer model and have no plans to recruit paid or unpaid staff.

Several Villages commented that they plan to reassess their model as they gain experience and better understand the demand for services. One established Village, in response to the suggestion that people would be more comfortable asking for services if they paid a fee, considered charging a fee. The Board rejected that option because it is committed to offer services to anyone in the community who needs them. The group does accept donations. Another all-volunteer model does not charge fees but after years of operation has suggested donations on its website.

The organizational process, in most cases, has been a grassroots effort. The founders of Villages have a vision and commitment to make things happen. They recruit their friends, other community leaders and volunteers who share the vision and work hard to make the vision materialize. Central to this is the dissemination of information to the community and getting the targeted community involved in a planning process. Once the idea is shaped, planning generally spanned 1.5 to 2 years with monthly meetings. However, some Villages started to provide services during the planning and start-up period.

### **Governance and Operations**

Villages in Montgomery County recruited volunteers to help develop and implement their organizational structure, and for those that incorporated, in applying for incorporation and attaining non-profit status. Pro-bono legal help was obtained, usually from a neighbor recruited by word of mouth or through a listserv or newsletter. To some degree the governance is driven by structure – a corporation must meet certain governance requirements, including an annual meeting.

An outstanding feature of County Villages is their variability. All Villages have a governance Board and/or advisory group as well as at least one planning group, committee, team or task force. Board or governance groups ranged from 5 to 19 members. No Board/advisory or planning group members are

commercial service providers. One Village includes local government officials. Board members are Village founders, members of civic association governance groups, Village or community members, depending on organizational model and formality of the organization.

In some cases, when Villages encompass more than one neighborhood, Board or planning committee members reflect each neighborhood in the Village's area. Board members may have specific roles, e.g. committee chair, volunteer coordinator, trainer of volunteers, administrative helper, and money manager. Board members tend to be active as volunteers and as those who communicate information about the Village, its activities, recruit volunteers, and meet with communities considering new Villages to provide them with information and guidance.

The majority of Boards, steering committees, planning or advisory groups meet monthly or bi-monthly, though one Village's steering committee meets only as needed. Villages that are incorporated have articles of incorporation, by-laws and officers, and other requirements of incorporation. Most provide for staggered terms for Board members, with terms of two or three years most common. Those involved in governance generally serve more than one term.

Regardless of organizational model, all but one operating Village and those in planning stages have written mission statements and a list of services that are or will be provided. Should an unlisted or novel request be made, it would be considered and filled if possible and appropriate.

Two Villages have block coordinators or block captains who are charged with knowing the people on their block. They are the first point of contact when a resident on their block needs a service. One operating Village has a Coordinator of block coordinators who recruits new coordinators, with the help of the Board organizes training, and holds social and thank-you sessions with the block coordinators. Another operating Village that has block



captains has received no requests for services and has delivered no services during its five years in business.

The majority of operating Villages provide training for volunteers. Most emerging Villages plan to do so. Training covers information on aging, common sensitivities and preferences of older persons, i.e. letting them know: when a volunteer is coming—no surprise visits; the importance of being on time; how to assist people with mobility, vision or hearing limitations; the importance of communicating what the volunteer will and will not do; how to handle money when doing errands or shopping; how to say no; recognizing elder abuse and reporting it; how to handle observed changes in physical or mental functioning; what to do in an emergency as well as common issues and tips for relating to older people. Most Villages have partnered with organizations that focus on safety or on older persons and are experienced trainers. Partners who provide training include fire and police departments, hospitals, County personnel, Senior Connection, IONA, and the Jewish Council on Aging. Some have formal training manuals. Volunteers are made aware of County resources and other resources for aging and aging services.

## **Finances**

Annual budgets for County Villages ranged from \$0 for the all-volunteer no fee model, to actual or planned annual budgets ranging from \$25,000 - \$80,000. Membership fees, donations and grants constitute funding sources. Most Villages have household and individual memberships. They may be full memberships (i.e. member is using individual services), or associate memberships (i.e. member may attend social and educational functions but is not using services). Membership fees (current and planned Villages) range from \$450 for a full membership per household, to \$350 for an individual to \$250 for associate membership per household, to \$150 for an individual associate membership, a portion of which is tax deductible. At

least one emerging Village plans to set its membership fee between \$25 and \$75. Sources of grant funding are local government and national foundations.

Several Villages have received donations from older adults who use services and/or support the Village concept. Donations range from \$25 to \$4,000 though most are small. All Villages benefit from donated meeting and office space, printing and copying services, and several have received publicity in news media, including being interviewed by them.

### **Services**

All groups interviewed surveyed their catchment areas to: assess need; identify potential volunteers; and, identify residents who indicated they need support in various areas. The surveys included questions about what services people wanted. Thus, from the start, Villages are prepared to provide services that community residents need and want.

All the Villages interviewed adopted a volunteer first model –that is, service will be provided by volunteers. Only when that proved not feasible because of availability or the nature of the service needed, will referrals to professional providers be made.

The most requested service in Montgomery County is transportation. This is consistent with the report of the national study of Villages that affiliate with Village to Village Network, a fee-based membership organization that serves Villages with webinars on relevant and timely topics, national meetings and most importantly, a communication network among its members. In Montgomery County one Village launched by providing transportation only and plans to expand the services it provides as it gains operational experience. During its second year in operation, this Village's 50 volunteers gave 1,400 rides to about 100 people .

Three Villages partner with Senior Connection, an organization that coordinates transportation by answering phone requests and scheduling rides. Senior Connection schedules transportation by private vehicle driven by partner Villages' volunteers. Drivers are paired with riders from their own Village if possible, but volunteers also are called on to provide transportation to others. They prefer advance scheduling but accommodate short-notice requests if they are able to. Their transportation service has centered on medical appointments with some exceptions.

The Jewish Council on Aging and The Senior Connection, as partner organizations, received a grant to coordinate and schedule transportation for Montgomery County Villages. The web-based scheduling software they will use was identified and demonstrated by the COA 2012 Summer Study on Transportation.

Montgomery County suburban, urban and rural residents are dependent on private vehicle transportation. Most older residents have a long-term driving history, partly because of convenience and partly because public transportation is limited, especially in upper parts of the County. Even when bus and metro transportation is available, many older people cannot get from their homes to a bus or metro stop. The loss of ability to drive is a challenge that Villages and the County must meet by offering accessible, affordable, user-friendly transportation. A 2012 COA Summer Study recommended that the County develop and implement a ride-sharing system using vans, private cars and buses that are owned and operated by retirement communities and service organizations in off-hours or when they are unused. We hope that such a service will be a part of the County's transportation system.

The second most requested service involves social interaction. Friendly visiting is a service provided by all operating Villages and some emerging Villages. For example, volunteers read to visually impaired elders, help with

paperwork or simply engage in discussion. Older residents often are socially isolated and hungry for social interaction. When they are mobile and have transportation, they can interact with merchants and with others in the community, even if most of their friends have moved away or died. When they can no longer drive, they are more dependent on visitors in their homes or on activities in senior centers or in their communities, assuming they can get to them. Walking groups, knitting groups, book clubs, outings to restaurants, museums, theatres, and volunteering for organizations etc. rank so highly among services desired and used, partly because they allow social engagement in addition to their primary focus. Several Villages reported that older residents who themselves are recipients of services, visit neighbors as volunteers.

Assistance with household chores, including bill paying and organizational help, also is frequently requested. Volunteers can complete some chores but also can advise older neighbors on whether they need a professional service provider, e.g. plumber or electrician, and be present when the provider is in the home.

Other frequently requested services are yard work, errands, and computer assistance. Exercise and other group activities offer multiple types of stimulation and are frequently used.

Despite clear preferences for types of services delivered, aside from transportation, few Village members or older residents use services in a given month. After transportation, the most utilized service is participation in social and educational programs. Some Villages report that a few people request services often. All surveys identified more volunteers than residents who said they needed services. There are many hypotheses that attempt to rationalize why people are reluctant to request services: pride in independence; denial of aging and changes in function; embarrassment about asking for or accepting assistance from neighbors; embarrassment at

accepting help from a volunteer. One Village conducted a survey, identified volunteers and people who need services, yet has not had a single request in five years of operation. In another instance, it proved impossible to establish a planning committee. We speculate that in these instances there was limited networking and an inability to implement a vision.

Some users of services need more help than volunteers can appropriately provide, largely because of the nature of the assistance needed. In such cases, recommendations and/or referrals to professional providers are common. Some Villages partner with preferred providers to whom they refer neighbors. Those providers may give a discount to Village customers, but most importantly they have been vetted and/or recommended by others who have experience with them. Preferred providers may do home repair, home modification to accommodate aging in place, household or yard work, grocery delivery, transportation, money management, organizational work and bill paying, legal work and health and/or home health services. Typically, Village staff or a volunteer will follow up to see if the situation is being resolved.

## **Outreach**

Montgomery County Villages are founded and governed, with few exceptions, by white, middle to high-income residents. This pattern does not reflect the population of the County. Fourteen percent of Montgomery County residents identify as Asian. Asian American Seniors represent 12.3 percent of seniors in Montgomery County. The largest groups are Chinese, Indian and Korean, with Koreans having the largest proportion of seniors. Seven per cent are Hispanic and 11 per cent African American and continental African. One goal of the Summer Study project was to explore interest in the Village concept by diverse groups and to examine its feasibility and practicality for such groups. An initial activity was to reach

out to representatives of population groups that are under-represented in County Villages, yet include substantial numbers of older residents.

A panel discussion, organized and moderated by a Summer Study Group COA Commissioner, was held. Through the County Office of Community Partnerships, the Summer Study group arranged for three representatives from diverse communities and faith based organizations to participate in a panel discussion to help inform the Commission about their communities, cultures and the needs of their aging populations. Participants were: Sanjana Quasem (Program Coordinator II, Asia-American Health Initiative, Montgomery County DHHS); Anna Maria Izquierdo-Porrera (Executive Director, Care for Your Health, Inc.); and, Mansfield Kaseman (Interfaith Engagement Cluster, Office of Community Partnerships).

Ms. Quasem and Dr. Izquierdo-Porrera pointed out that first generation immigrant seniors differ from second and later generation U.S. born individuals. Both Asian American and Latinos who immigrated at older ages are poorly acculturated, not proficient in English, tend toward low income and employment, have low educational levels and do not know how to use social services and public systems. Many first generation immigrants lack health insurance. These characteristics are barriers to health care. For Asian Americans who represent 13.9 per cent of County residents, 12.6 per cent of whom are over 50, the greatest health risks include breast, cervical and colo-rectal cancer, hepatitis B and liver cancer, diabetes, osteoporosis (20 per cent of women over 50), and tobacco and other substance abuse. Asian American seniors report poverty (16.2 per cent) and disability (25 per cent). A 2008 focus group conducted with Chinese American seniors identified mental health and social isolation as major needs that are not adequately addressed. The Asian American communities have several outreach programs that attract seniors. They are organized around national origin rather than by neighborhood and are separate for each subgroup. Several

are faith-based. Asian American programs and services are run by the Chinese Cultural Community Senior Center, the Vietnamese American Senior Association that meets within the Longbranch Senior Center. Silver Spring hosts a Vietnamese group. Burmese seniors meet at their temple. The Housing Opportunities Commission hosts national/ethnic senior groups, e.g. Chinese seniors meet at Waverly House in Bethesda. When queried about aging in place, it was clear that no one model applies to all Asian American subgroups. Many older Asian Americans are cared for by families, often motivated by financial considerations rather than by desire. Elder abuse is known to occur in some families. Support for Asian American elders often comes through social groups such as those mentioned above. Some of those groups provide social activities and social services, other do not. The Village concept was thought to be attractive and acceptable. If the Asian American community is to be involved with existing Villages, services for that community would have to be in their respective languages and in a cultural context.

Anna Maria Izquierdo-Porrera provided information about the Hispanic community. Like the Asian American community, the Hispanic community is heterogeneous. As noted, she emphasized differences between first and second generation immigrants. The former are poorly acculturated, tend to be low income, have little formal education and have poor proficiency in English. Although many Latino cultures have traditions of multi-generational communal households, with younger generations working and in school, caring for older people at home has become problematic. When seniors cannot be supported in communal households, or when they need the support that a Village can provide, families often decide to send elders back to their native country to be cared for by relatives. Since nursing homes and assisted living facilities are costly and lack a cultural context and competence to support older first generation Hispanic Americans (e.g. cognitive capacity testing and ordinary conversation in Spanish), the

community sees two options: family support or reverse migration. She said that second generation Hispanics are better acculturated, yet retain a reliance on family support, and have difficulty accessing services to support homecare, particularly if Spanish language services and familiarity with their cultures are important. In discussion about the role of the church as a support for Latino seniors, it was noted that informal support is sometimes provided but that the church, though very important to the community, has no special competency when it comes to meeting the needs of older people. When queried about the attractiveness of the Village concept, Dr. Izquierdo-Porrera thought that a virtual Village, anchored in a faith-based organization might be appealing and helpful.

Mr. Mansfield Kaseman (Kasey) who works with faith-based organizations noted that church membership comes with a commitment to volunteer for both the church and the community at large. Some years ago, he surveyed people 64+ and provided them with lists of church-sponsored and County services. These services, for the most part, remain available. In response to demographic trends, some churches are hiring staff to support their aging members, but there is little coordination or sharing of resources among churches. He suggested that once Montgomery County completes its neighborhood maps and puts faith-based organizations on those maps, we will be able to see the distribution of available services offered by each organization and identify volunteer and other resources as well as gaps that lack services but have population groups that need them.

## **ISSUES AND CHALLENGES:**

### **Community characteristics**

Founders and leadership of Villages in the County are older adults who are white and represent middle to upper income individuals. Some Villages span areas with racial, ethnic and economic diversity. They want to include diverse groups but have mixed experiences in these efforts. A faith based



community was approached and was not responsive, possibly because of all they are being asked to do at this time.

It was suggested that the Village concept might appeal to diverse lower income communities. To implement it, churches or national/ethnic organizations might sponsor or serve as parent organizations for Villages in such communities. Services are needed and would be welcomed but must be provided in the community's cultural context, language, and involve families for those cultures in which families operate as a unit and are involved in all decisions about medical information and social activities. Volunteers from the relevant community would need to join other volunteers who can navigate the culture and the larger community service system. There is a big difference between professionals who volunteer and have experience in leadership, networking, partnerships, organization management and public speaking and restaurant and hospitality industry workers who volunteer. Each group offers different things, and both are important. The tenets and best practices of community organization might be used to motivate grass roots groups to form Villages or to partner with existing organizations, especially in ethnically diverse and lower income communities.

### **Liability**

Most Villages have been or are concerned with liability issues for Board/committee members and particularly for volunteer service providers. They have consulted with lawyers, and different lawyers have given different advice about whether and what type of insurance is needed. For Villages that partner with Senior Connection, transportation by volunteers is covered by Senior Connection's insurance. It is unclear whether insurance will be provided when JCOA and Senior Connection coordinate transportation for all County Villages. Three Villages carry insurance to cover their volunteers and governance. Other Villages rely on their volunteers'

personal and homeowners' insurance and on Maryland's Good Samaritan law, and carry no insurance. The need for insurance has been a topic of discussion by Washington Area Villages Exchange and at BCC Regional Services Center meetings

### **Communications:**

Getting the word out about Villages, the reason for their founding and what they do is critical. Montgomery County Villages have used neighborhood newsletters, websites, flyers, personal communication and listservs to inform their communities and to recruit volunteers and invite requests for services. Villages seek volunteer help from younger neighbors who are proficient in website development and maintenance as well as from professionals who may donate their services. Aside from getting needed IT and web design help, involving younger neighbors and local businesses will create a wider community about the Village and may involve them in its operations.

Communicating with individuals who take part in Village activities and services and soliciting their feedback and suggestions is critical to maintaining and providing relevant services that are of high quality and meet the needs of older residents.

### **Serving the oldest old and meeting need for transition to more intensive services**

Residents who receive services from Villages are getting older. Their needs change and may become more intensive. Village governance needs to consider whether to provide some of these services and/or partner with health care and other organizations that deliver these services in the client's home. Village involvement may be in coordination of services, in geriatric assessment, in monitoring services, satisfaction with providers and quality of life of the resident, or in referral to providers or to assisted-living or nursing

facilities as needs increase. Villages also may help residents with end-of-life planning. The extent to which Villages engage in fulfilling these needs must be considered and prepared for before the needs become acute.

### **Volunteer Recruitment**

In formative stages, community surveys identify more volunteers than residents who say they need assistance. Retention of volunteers and recruitment of new volunteers is essential for sustainability. Methods to recruit volunteers and to acknowledge their service need to be shared. Services require different skill levels and training. A Village that is or plans to offer home health care or end-of-life counseling will benefit from having nurses, social workers, psychologists, physicians and other trained professionals among its volunteers. For household chores and maintenance, people who can do the physical work are needed – perhaps older teens and younger adults. Volunteers with similar cultural backgrounds to older people being assisted may be comforting to an elder. A diverse group of volunteers is important for delivering assistance and for sustainability.

### **Sustainability**

Sustainability is a challenge that volunteer organizations often face. Founders and early leadership develop a vision and commitment that is difficult to transmit to others. In time, operating procedures evolve and needs change. In the excitement and hard work of starting a Village and getting things going, it is difficult to plan for succession of leadership, document policies and procedures and plan for future sustainability. It is critical to attract and involve new people with fresh approaches who may become the next generation of leaders, as well as new members and volunteers.

For Villages with substantial expenses, fund raising and membership recruitment and retention are vital to sustainability. Some villages that

launch with volunteer staff plan to have paid staff as they grow. Sustainability planning includes exploring sources of financial support from public and private sources: funds for staffing, office space and equipment; programs; training and grant resources. Grant applications and good management practices require data about finances, services, membership and volunteers. Data systems are vital to sustainability. Financial and in-kind benefits of liaison with other organizations and public-private partnerships merit investigation. The impact of fees on service requests is another consideration.

### **Comparison of Senior Villages in Montgomery County with National Survey Results**

Senior Villages in Montgomery County have been operating for a shorter time than the Villages surveyed for the national study. Like those reported in the national study, senior adults were very involved in planning the Villages and shaping their organizational model and services. Like others, planners of Montgomery County Villages surveyed their communities to identify needs and to identify volunteers.

A striking characteristic of Montgomery County Villages is their commitment to non-membership, all volunteer organizations and an underlying philosophy that services should be available to everyone in the community upon request. All the Villages in the National Overview are membership organizations and almost all (96 per cent) charge membership fees. Among Montgomery County's operating Villages, one-third are membership, fee-based organizations. This is the most striking difference between the National Overview and our Summer Study.

Fewer Villages in Montgomery County operate as formal organizations with business plans and written personnel policies, as compared with those reporting in the National Overview. However, all have at least one advisory group, and few Villages in our County have paid personnel. Most likely, this

is in part due to the newness of many Montgomery County senior Villages and the commitment of many Villages to an all-volunteer model. Consequently, Montgomery County Villages have lower budgets than Villages that participated in the survey for the National Overview.

As in the National Overview study, the majority of Montgomery County Villages are free-standing. Those that are not are more likely to be associated with neighborhood/homeowners' associations than with social service agencies, care providers or senior centers. Both the National Overview and the Montgomery County studies make it clear that Villages assume their own character, shaped by the preferences of the residents of the communities that establish them.

Both studies found that most volunteer service is helping residents on a one-to-one basis. The National Overview differentiated Village member volunteers from other community residents. The Montgomery County study did not because the majority of operating Villages in the County are non-membership organizations. Like the National Overview, Villages that are fee-based have discounted membership on the basis of income. The range of planned or actual membership fees is narrower, \$25 to \$450 compared to \$25 to \$1,200 in the National Overview.

The most frequently requested services are transportation and social interaction, ranging from reassurance calling to social visiting to excursions. The range of services offered is similar across Villages but varies with individual community needs. More established Villages have begun to consider more intensive health-related services as member/residents join the "oldest old." Some are considering partnering with providers of such services, while others consider personal health-related services beyond their scope.

This comparison of Senior Villages in Montgomery County and the National Overview points out similarities as well as important differences among

Villages. It reinforces the idea that Villages, though they have similar goals, reflect the values of their leadership team and participants and are responsive to the needs of the communities they serve.

### **Village Coordinator Assistance**

Village leaders and members of the Summer Study Group considered how the County's new Village Coordinator might best assist Villages. Top priorities for the Village Coordinator include:

- a. Identifying major areas in which decisions must be made by emerging Villages;
- b. Advising emerging Villages in major decision areas, e.g. model, determination of boundaries, fee structure if relevant, forming and working with their planning group, communicating with target audience and gaining their support; communication and dissemination methods, including website development;
- c. Providing sample documents and templates to help new Villages apply for incorporation, non-profit status, develop by-laws and policy and volunteer training handbooks;
- d. Collecting and disseminating information about best practices;
- e. Serving as resource on business practices, i.e. incorporation; data systems; accounting and reporting; business infrastructure;
- f. Providing guidance on liability and insurance issues including vendor and volunteer liability;
- g. Providing guidance on vetting vendors and volunteers;
- h. Advising on data collection processes and system;
- i. Coordinating training for Village leadership and volunteers;
- j. Facilitating networking and communication among Villages, particularly among developing and operating Villages;

- k. Serving as a point of contact for resource referrals to services provided by Montgomery County agencies and other public or private services;
- l. Initiating interaction and partnerships between faith communities and Village; and,
- m. Seeking and creating opportunities to speak to different types of communities and organizations about Villages and aging in place in the community.

### **Recommendations for Commission on Aging**

The Aging in Place Committee recommends that:

1. The Commission support the vast majority of Montgomery County's older residents who choose to age in place. One way to do this is to support and assist current, emerging and new Villages in Montgomery County.
2. The Commission thank the County Council for approving a Village Coordinator position.
3. The DHHS Office on Aging and Disability charge the Village Coordinator to identify reasons for success and failure of efforts to establish Villages in Montgomery County so that emerging Villages can benefit from the experience of others.
4. The to-be-hired Village Coordinator meet with the AIPC regularly to discuss ongoing Village-related activities.
5. The AIPC continue its outreach activities with diverse communities to explore how best to support aging in place in these communities. This effort might lead to a Summit on Aging in Place in the Community.
6. AIPC's agenda during the coming year focus on Villages. The Committee might identify aspects of the Summer Study Report that should be referred to the Village Coordinator for implementation; work with the Village Coordinator on planning for sustainability;

identify unanswered questions raised by the Summer Study, e.g. why some Villages operate in isolation and reasons for success and failure.

7. The COA recommend AIPC integrate more fully with other COA committees and agencies, specifically the Health and Wellness Committee and the Housing Opportunities Commission. As more people join the “oldest old,” transition to integrated services is expected to be increasingly important.
8. Since transportation is the number one service requested by older residents associated with Villages, the Village coordinator and mobility manager work together and share information with each other and with the Commission.
9. The COA, to communicate with the public about Montgomery County Villages, include information on its website about existing and emerging Villages, e.g. their locations and contact information, and mount a Seniors Today program on County Villages.



## **References**

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Scharlach, A.E. Creating Age-Friendly Communities in the United States. *Ageing International*, 27:25-38, 2012

Silva, P., Thomas, C., Cober, C., Rabinovich, B. Aging in Place in Maryland: Review of Senior Village Style Programs: Phase 1 Summary Report for Village Participants, Westat, Rockville MD, October 2012.

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## Appendix: Introductory Articles about Senior Villages

Brief from Wikipedia

[http://en.wikipedia.org/wiki/Elder\\_Village](http://en.wikipedia.org/wiki/Elder_Village)

Brief newspaper article from Boston area village

[http://www.boston.com/news/local/articles/2009/07/09/new\\_programs\\_help\\_elderly\\_stay\\_in\\_their\\_own\\_homes/](http://www.boston.com/news/local/articles/2009/07/09/new_programs_help_elderly_stay_in_their_own_homes/)

This webpage is from the UC Berkeley projects that Andy Scharlach and his students are involved in. The first link is an overview. The second link is a brief report of their national study that included the survey we plan to use.

[http://cssr.berkeley.edu/research\\_units/casas/documents/CASAS\\_fall\\_2011.pdf](http://cssr.berkeley.edu/research_units/casas/documents/CASAS_fall_2011.pdf)

<http://documents.clubexpress.com/documents.ashx?key=kYA6bFCyEAFYT%2BTW4xG7fw0RCfsL0%2F4H%2FFAmAbqcKGaecmWW44ASlg%3D%3D>

A parallel study to the Villages study on NORCS by some members of the above team and their colleagues

<http://agingandcommunity.com/wp-content/uploads/2012/12/National-NORC-FINAL.pdf>

An article from the same group published in The Gerontologist

<http://gerontologist.oxfordjournals.org/content/early/2011/08/25/geront.gnr083.full?keytype=ref&ijkey=pl4rX3nNKZZUzvy>

This article includes a paragraph about benefit to caregivers, something the

Commission talked about.

<http://www.nextavenue.org/article/2012-06/village-movement-redefining-aging-place>

The Watertown Together article talks about the Watertown village, includes excellent resources and the survey and volunteer interest forms they used to explore their community's interest.

[Www.watertowntogether.org](http://www.watertowntogether.org)

Steuben County, NY developed a plan for aging in place for their county. The short document is a brief intro. The longer document, the second link, includes the survey that they distributed to county residents.

<http://www.steubenseniorservicesfund.org/annual-initiatives.htm>

<http://www.steubencony.org/files/documents/ofa/AAAAFinalStudypaper.pdf>

This document is directed at funders of aging in place projects and plans.

You can click on the Introductory Report

<http://www.thescanfoundation.org/age-friendly-communities-movement-create-great-places-grow-and-grow-old-america>