Isiah Leggett
County Executive

Kenneth B. J. Hartman
Director

MEMORANDUM

March 9, 2009

TO: George Leventhal, Chair
Health and Human Services Committee

FROM: Kenneth B. J. Hartman, Director
Bethesda-Chevy Chase Regional Services Center

Subject: Villages in Montgomery County

Thank you for this opportunity to provide information to the Committee on the status of Villages in Montgomery County and County department efforts to support them.

A "Village" is a community-based and operated organization dedicated to helping residents remain in their homes as they age ("aging in place"). 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 including fee-based, membership, and volunteer.

The Burning Tree Village in Bethesda is the only known Village in operation in Montgomery County. At least a dozen other communities throughout the County are in some stage of exploring or implementing a village model. The Burning Tree Village provides services through volunteer activities and through partnerships with other organizations that complement volunteer activities.

We have witnessed accelerating interest in this subject both in Montgomery County and nationwide since late 2007. Beginning in the fall of 2007, the Office of Community Partnership (OCP) initiated discussions on aging in place with the Burning Tree community leaders. During the course of 2008, OCP hosted several additional sessions involving other communities primarily in the Bethesda area to facilitate the sharing of information. These sessions included a number of providers of services to seniors, as well as representation from Rockville and Gaithersburg. The Bethesda-Chevy Chase Regional Services Center (BCCRSC) also became involved in supporting these communities in late spring of 2008.

OCP and BCCRSC staff maintained regular contact with the leadership of the Burning Tree Village throughout 2008 and provided knowledge and referral support. BCCRSC provided a small grant and in-kind support to Burning Tree Village to assist in start-up needs including printing and 501(c)3 filing costs. Similar support has since been provided to Bannockburn Neighbors Assisting Neighbors, a Village model that coordinates volunteer services for any resident in need. OCP, the Department of Health and Human Services (DHHS), and BCCRSC also supported Burning Tree Village by assisting them with developing their survey and its printing.

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

In response to this goal, BCCRSC and OCP hosted a "Villages" forum on January 21, 2009 to create an opportunity for residents to become familiar with County resources; learn about existing community efforts; and discuss opportunities for partnerships with the County, private service providers, and other communities. The forum included a presentation by the Burning Tree Village on the strategic challenges facing Village initiatives. Other communities spoke briefly on the status of their initiatives and challenges they faced. See the attached notes for more information.

Based on feedback received, a follow up will be scheduled in late April. In addition, BCCRSC has established a web resource for Villages. Notes and presentations from the January 21 meeting can be found there. The BCCRSC has also created a Villages newsletter and is compiling a "toolkit" that will provide tips, resources, and other information for communities considering establishing a Village.

The Regional Services Centers, OCP, and DHHS will continue to work in partnership with emerging Villages to connect these efforts with existing County and non-profit resources. We will help facilitate information sharing between communities, training, and the evaluation of Village models.

Thank you again for this opportunity to provide this information to the committee. I look forward to discussing our efforts further on March 12.

KH

Attachment

Villages Meeting - January 21, 2009

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

Welcome

Kenneth Hartman, Director of the Bethesda-Chevy Chase Regional Services Center, welcomed the audience to the meeting. He explained the purpose of the meeting was to build upon priorities established in the County Executive's

Senior Summit held in November, 2008. He said the meeting was an opportunity for communities to share information and brainstorm approached to the challenges inherent in establishing a "Village" model.

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

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

Presentation

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

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

Discussion

Challenges facing new Villages.

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

Elements of a Successful Initiative

- Build Relationships between neighbors

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

Potential Roles for Montgomery County in Support of Villages

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

Next Steps

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