



[agewellvt.org](http://agewellvt.org)  
Helpline: 1-800-642-5119  
P 802-865-0360  
F 802-865-0363  
76 Pearl Street, Ste. 201  
Essex Junction, VT 05452

October 4, 2019

BOARD OF  
DIRECTORS:

Joan Lenes  
(Board President)

Susie Brooks

Meagan Buckley

David Carter

John Davis

Liz Gamache

Annemarie Plant

Dr. Allan Ramsay

Sarah Gentry Tischler

Dr. Lynda Ulrich

Ruth Wallman

Carolyn Weaver

Town of Richmond  
PO Box 285  
Richmond, VT 05477

For more than 40 years, Age Well (formerly CVAA) has provided services and support that allow seniors to stay independent, and remain healthy at home, where they want to be. We excel at integrating community resources, health services and wellness programs to enhance and improve quality of life for all seniors in the Northwestern Vermont.

Thanks to past support from the Town of Richmond, we have been able to offer care & service coordination, Meals on Wheels; community meals; wellness programs; social activities; transportation services; expertise on Medicare, insurance, and long and short-term care options; and a Helpline to Richmond residents.

Vermont is ranked as the second "oldest" state in the country and the population of seniors is only expected to grow. The state's senior population is expected to nearly double in the next fifteen years. Older adults living in rural areas have less access to healthcare, including specialized healthcare, and the services tend to be more costly than those provided in metropolitan areas. Overwhelmingly, Vermonters want to grow old in their own homes, Age Well provides the services and support to ensure that is a possibility.

We are writing to request support in the amount of \$2,000.00 from the Town of Richmond. As a non-profit, most our services are provided at no charge and we rely on donations and town funding to continue to help our aging population access services and receive the support they deserve. We thank you for your past support for our programs and services.

If there are any questions regarding our programs or services, please do not hesitate to contact me. Thank you for your time and consideration.

Sincerely,

Sara Wool,  
Director of Development & Communications

## 1. What is Discretionary Funding?

Discretionary funding is a duly-appropriated sum of money in the Town's expense budget allocated to an eligible not-for-profit organization by the Selectboard and approved at Town Meeting.

## 2. What Types of Organizations May Receive Discretionary Funds?

Discretionary funds may only be allocated to not-for-profit; community-based social services providers. In order to receive discretionary funds directly, an organization must be incorporated as a not-for-profit and registered with the State of Vermont., unless exempt and have a Federal Employer Identification Number (EIN).

## 3. What Types of Organizations May Not Receive Discretionary Funds?

For-profit entities may not receive discretionary funds, except when the primary non-profit contractor subcontracts with a for-profit entity as part of the delivery of services. Such subcontracts, however, must be only an ancillary part of the program to be funded, not the primary basis for the discretionary award, and must be approved by the contracting agency.

## 4. What are the Restrictions on the Use of Discretionary Funds?

All public funds, however awarded, must be used for a Town purpose. In general, a Town purpose is defined as an activity or service that is open to all members of the public, regardless of race, creed, gender, religious affiliation, etc., without restriction, and which does not promote a particular religion.

Programs and services provided by religious or religiously-affiliated organization must be able to demonstrate that the program is open to non-members, is not a religious program, and does not promote the religion.

Closed membership groups, which are those to which membership is restricted or subject to eligibility based upon prohibited factors, may generally not receive funding.

Groups that serve a particular population, for example, those age 65 and above in a particular community; are not considered a closed membership group, as long as the program is open and accessible to all seniors in the community. Similarly, tenant organizations in public housing may also receive funding, as long as they provide equal access to all residents of the public housing units they serve.

Funds may only be allocated for a public purpose and may not support political activities and private interests.

## 5. How to Apply for Discretionary Funding?

All organizations that wish to receive discretionary funding must submit a "Request for Special Appropriations" application to the Town Manager. The application elicits information about an organization's experience, qualifications, and integrity, and the project or service for which the organizations is requesting support. The form is available on the Town website under DOCUMENTS, then, APPLICATIONS or by emailing Kathy Daub-Stearns, Administrative Assistant, at: [kdaubstearns@richmondvt.gov](mailto:kdaubstearns@richmondvt.gov) . Deadline for submission is the end of the day, October 4, 2019.

Town of Richmond

Request for Special Appropriations

Request for Fiscal Year: 2021

Organization's Name: Age Well  
Address: 76 Pearl St, Suite 201  
City, State, Zip: Essex Junction, VT 05452  
Website address: www.agewellvt.org

**A. GENERAL INFORMATION**

1. Program Name: Support and Services for Older Adults

2. Contact Person/Title: Madeline Graham, Associate Director of Development & Communications

Telephone Number: 802-662-5270

E-mail address: mgraham@agewellvt.org

3. Total number of individuals served in the last complete fiscal year by this program: 10,000+. Our Fiscal Year ended 9/30/19 and we are still finalizing data entry and analysis.

4. Total number of the above individuals who are Town residents: 85  
Please, attach any documentation that supports this number.

Percent of people served who are Town residents: ~.85%

5. Amount of Request: \$2,000

6. Total Program Budget: FY20 – 7.05M Percent of total program budget you are requesting from the Town of Richmond: 0.03%

7. Please state or attach the mission of your agency: To provide the support and guidance that inspires our community to embrace aging with confidence.

8. Funding will be used to:  
 Maintain an existing program       Expand an Existing Program  
 Start a new program

9. Has your organization received funds from the Town in the past for this or a similar program? Yes

If yes, please answer the following:

a. Does the amount of your request represent an increase over your previous appropriation? If yes, explain the reason(s) for the increase. No, same amount as last year's request.

b. Were any conditions or restrictions placed on the funds by the Selectboard? No.  
If yes, describe how those conditions or restrictions have been met.

\_\_\_\_\_  
\_\_\_\_\_

## B. PROGRAM OVERVIEW

1. Statement of Need: Identify the issue or need that the program will address (use statistical data to justify the need for the program). To what extent does this need or problem exist in the Town of Richmond? \_\_\_\_\_

In FY 2019 (10/1/18-9/30/19) Age Well served 85 Richmond residents with the necessary support to manage their daily living needs, with the goal of keeping them active, healthy and independent. Our wide array of programs enhance quality of life and improve health outcomes. Access to food, transportation and services can be particularly challenging in a rural town like Richmond where we find the needs to be even greater.

2. Program Summary:

a. Identify the target/recipients of program services. Specify the number of Town residents your program will serve during the fiscal year and explain the basis upon which this number is calculated. Indicate any eligibility requirements your program has with respect to age, gender, income or residence. \_\_\_\_\_

We estimate we will serve 105 next fiscal year, up from 85 in the previous year. As Vermont's aging population continues to expand so to will the need for our services. We will be also expanding our wellness offerings throughout our service area including Richmond. We hope to better track attendees as well as grow the amount of attendees at our free Tai Chi classes. Our programs and services are provided to those 60 years and older\* and their caregivers in our four county service area: Addison, Chittenden, Franklin and Grand Isle counties. \*We do serve individuals under 60 years of age who qualify as Vermont Center on Independent Living (VCIL) recipients as they qualify for a variety of our services. We do ask for suggested for donations from clients, but no one is ever turned away if they cannot afford to make a donation.

b. Identify what is to be accomplished or what change will occur from participating in the program. How will people be better off as a result of participating in the program? Describe the steps you take to make the project known to the public, and make the program accessible and inclusive? \_\_\_\_\_

Those provided services through Age Well will have increased access to healthy meals, in-home care, and community resources enabling them to remain healthier and more independent.

- 88% say our Meals on Wheels help them eat healthier
- 73% of Meal on Wheels clients say they feel more connected to their community
- 95% of Meals on Wheels clients say the meal and safety check help them stay at home
- 87% of clients report that the assistance they've received from their Care & Service Coordinator has improved their quality of life.

We market our programs and offerings through both earned and paid media as well as social media channels (Facebook, Twitter, Instagram, and LinkedIn). We track all our outreach efforts in order to maximize our return on investment and reach. In FY19, we created a new Director of Outreach position to help raise awareness in the community of our offerings.

3. Program Funding:

a. Identify how Town funds, specifically, will be used (i.e., funds will provide "X" amount of units of service.) \_\_\_\_\_ Town funds will help defray costs to provide services to

residents of Richmond. For example, Care & Service Coordination costs \$75.12 per hour; Meals on Wheels costs \$6.50 per meal; and Community meals cost \$5.00 per meal.

b. List the other agencies to whom you are submitting a request for funds for this program and the amount requested. How would this program be modified should revenues be lost? \_\_\_\_\_

Age Well submits town funding requests to the 50+ towns across four counties to help support Age Well's offerings in their town. The amount requested varies depending on the numbers of residents served from the specific towns between \$600 and \$5,500. Age Well's diversified developed initiatives help ensure that we avoid waitlists and continue the extensive suite of services to each and every resident. Should municipal revenues be lost, we will work to expand our other fundraising avenues such as direct mail, on-line campaigns, and corporate giving.

### **C. ORGANIZATIONAL CAPACITY**

1. Describe your agency's capability to provide the program including its history, previous experience providing this service, management structure and staff expertise. \_\_\_\_\_

Since 1974, we have been part of Vermont's Area Agencies on Aging, coordinating services and care for Addison, Chittenden, Franklin and Grand Isle Counties. In 2018, our Nutrition Coordinator was recognized as Vermont Dietitian of the Year and was appointed as a Dietitian Advisor to the Secretary of State of Vermont. Many of our staff have been with the organization for an extended period of time. As the largest and oldest Agency on Aging in the state, we are on the forefront in leading the way for our aging population.

In October 2018, Jane Catton, MSOL, BScN, RN, NE-BC, was appointed as Age Well's new Chief Executive Officer. She brings over 30 years of health care and administrative experience to this position. She holds a B.S. in Nursing degree as well as two Master's degrees; one in Health Care Administration and one in Organizational Leadership. She is a Board Certified Nurse Executive and holds additional certification in Health Care Quality. Jane has been active in supporting local health care partnerships and organizations, including advancing health reform initiatives through the Accountable Care Organization (ACO) within her local Health Service Area.

2. How will you assess whether/how program participants are better off? Describe how you will assess program outcomes. Your description should include: what (what kind of data), how (method/tool for collecting the data), from whom (source of data) and when (timing of data collection). \_\_\_\_\_

- Care & Service Coordination satisfaction surveys are mailed quarterly
- Meals on Wheels clients are mailed satisfaction surveys twice a year
- We currently use ServTracker, Penelope, SAMS, and Refer databases to track, monitor, and analyze services provided
- As a OneCare affiliate, we also benefit from use of PatientPing to help us monitor client health outcomes
- We're in the process of creating a survey for our Helpline and State Health Insurance Program to be administered in FY20.

3. Summarize or attach program and or service assessments conducted in the past two years. \_\_\_\_\_ Please see attached summarized reports from FY18 (FY19 has just ended on 9/30/19 and we are still finishing data entry and analysis).

4. Does your organization have a strategic plan and a strategic planning process in place?    We are working to finalize our new Strategic Plan following a strategic planning process and will be presenting it to our Board of Directors to receive board approval.    - If yes, please attach your plan.

The strategic plan should include a mission statement, goals, steps to achieve the goals, and measures that assess the accomplishments of the goals.

5. What is the authorized size of your board of directors?   12    
How many meetings were held by the board last year?   7  

I, the undersigned, confirm the information contained herein is accurate and can be verified as such. I understand and agree that if the requested funds are approved, the disbursement of funds are subject to all conditions established by the Richmond Selectboard.

Signature of Applicant   Madelaine A.   Date   10/3/19    
Print Name of Applicant and Title   Madelaine Graham Assoc. Dir. Development & Communications

# MEALS ON WHEELS IMPACT

FY18 Participant Survey Results



1,696 individuals served  
217,805 meals delivered



81% report Meals on  
Wheels helps combat a  
medical condition



88% report they eat  
healthier because of  
Meals on Wheels

## THE NEED

8% don't know how to cook  
16% have no transportation  
to buy food  
45% are unable to stand to  
prepare meals  
71% have a medical condition

## HEALTH IMPACT

79% now achieve and  
maintain a healthy weight  
86% feel better  
89% notice improved quality  
of life  
95% are able to stay at home

## SOCIAL IMPACT

65% find the safety check to  
be important to them  
73% feel more connected to  
their community  
92% look forward to seeing  
the volunteer driver

## WHAT PARTICIPANTS HAVE TO SAY

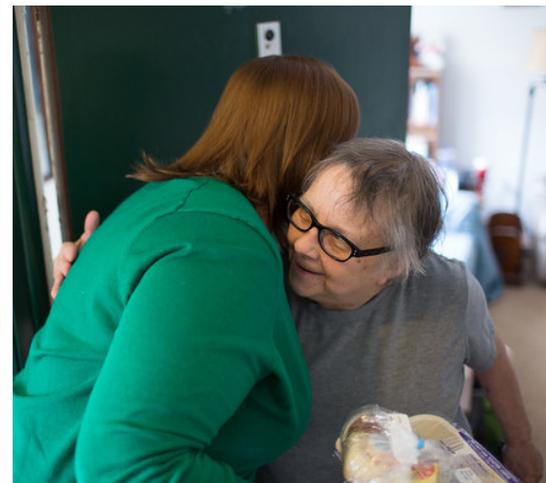
95% look forward to receiving Meals on Wheels

*"Meals on Wheels has helped me stay out of the hospital or nursing home and greatly improved my quality of life. I am really grateful."*

*"I live alone and my recent kidney transplant really took the wind out of my sails. I've been on Meals on Wheels for a few weeks now and it's been a big help."*

*"Your program is wonderful. If I didn't get food, fuel and medical assistance, I don't know what I would do."*

87% rate the Meals on Wheels program good to excellent



# CARE & SERVICE COORDINATION IMPACT

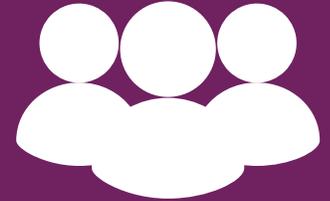
FY18 Results



2,052 individuals served  
23,080 hours of service provided



87% report assistance has helped improve their quality of life



69% have a home visit at least once a month

## THE NEED

11% of clients have complex issues that put them at risk of losing health, homes, resources, & independence  
15% income is < poverty level  
70% low to moderate income

## HEALTH IMPACT

89% of those assisted with public benefits reported the assistance helped them meet monthly incomes

## SOCIAL IMPACT

80% of clients reported they felt more able to make decisions about their options  
80% developed a plan to move forward

## WHAT PEOPLE HAVE TO SAY

96% of clients describe the quality of their Care & Service Coordinator's work as Very Good to Excellent

*"Age Well has provided my mom the ability to stay out of a nursing home and with family." -Robin*

*"Age Well is a wonderful way to get information and assistance to help you with all your health care needs" - Barbara*

*I still wish to remain in my own home as long as I am able. Our care & service coordinator is so understanding. To stay in my own home, manage my own affairs be independent is my goal. Age Well is the answer to my prayers, you people do good work!" -Marion*

100% would recommend Options Counseling to a friend

