

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 by clicking on BOARDS & MEETINGS > SELECTBOARD then scroll down to FY25 Budget and "FY25 Discretionary Funding Policy-for applicants" or by emailing Duncan Wardwell, Assistant to the Town Manager, at: dwardwell@richmondvt.gov. Deadline for submission is the end of the day, October 2, 2023.

Town of Richmond

Request for Special Appropriations

Request for Fiscal Year: 2025

Organization's Name: Age Well
Address: 875 Roosevelt Hwy Ste 210
City, State, Zip: Colchester, VT 05446
Website address: https://www.agewellvt.org/

A. GENERAL INFORMATION

1. Program Name: Support and Services for Older Adults

2. Contact Person/Title: Emma Kaplan, Development & Communication Associate

Telephone Number: 802-662-5275

E-mail address: ekaplan@agewellvt.org

3. Total number of individuals served in the last complete fiscal year by this program:
14,897

4. Total number of the above individuals who are Town residents: 216
Please, attach any documentation that supports this number.

Percent of people served who are Town residents: 1.45

5. Amount of Request: \$3,500

6. Total Program Budget: \$9,002,108 Percent of total program budget
you are requesting from the Town of Richmond: 0.038%

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.

Yes we are asking for an increase because we have seen a 29% increase in Richmond residents alone who sought out our services between our fiscal year's 21 and 22, and that number is only expected to grow.

b. Were any conditions or restrictions placed on the funds by the Selectboard? _____
If yes, describe how those conditions or restrictions have been met.

No

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 FY22 (10/1/22 - 9/30/22), Age Well served 216 Richmond residents, a 29% increase from the previous fiscal year. Services provided included 136 calls to the Helpline, 135 hours of Case Management, 1,979 Meals served, and 55 hours of Options Counseling. As our population continues to age, we expect our demand for services to increase as well.

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 that we will service 230 Richmond residents next fiscal year, a steady increase from 216 in FY22, and 168 in FY21. Our programs and services are provided to those 60 years and older and their caregivers in our four counties: Addison, Chittenden, Franklin, and Grand Isle. Note: we do serve individuals under 60 years of age who qualify as Vermont Center on Independent Living (VCIL) recipients. 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? Age Well is the largest Vermont Area Agency on Aging, providing meals, case management, and nutrition to older Vermonters. Those who receive our services will have increased access to healthy meals, in-home care, and community resources that enable them to remain healthier and more independent at home, where they want to be.

3. Program Funding:

a. Identify how Town funds, specifically, will be used (i.e., funds will provide "X" amount of units of service.) In FY22, Age Well served 216 Richmond residents with the necessary support to manage their daily living needs, with the goal of keeping them active, healthy, and independent. Our 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, especially as our state continues to age.

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 funding requests to the 50+ towns across our four counties to help support the services we provide to their residents. The amount requested varies depending on the number of residents served, between \$1,000 and \$10,000. Age Well's diversified development initiatives help ensure that we avoid waitlists and continue the extensive suite of services to each and every resident who needs them. Should municipal revenues be lost, we will work to expand our other fundraising avenues such as direct mail, online campaigns, grants, 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, Age Well has been a part of Vermont's Area Agencies on Aging, coordinating services and care for Addison, Chittenden, Franklin, and Grand Isle counties. 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 at the forefront in leading the way for our aging population.

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). Case management satisfaction surveys are mailed quarterly and 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 the use of PatientPing to help us monitor client health outcomes.

3. Summarize or attach program and or service assessments conducted in the past two years. Please find attached a snapshot of our FY22 data report for Richmond.
Please note: our FY23 just ended on 9/30/2023 and we are still finishing data entry and analysis. We will send you an updated report as soon as all of the data has been entered.

4. Does your organization have a strategic plan and a strategic planning process in place? Please find attached - 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? 16
How many meetings were held by the board last year? 6

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 Emma Kaplan Date 9/26/2023

Emma Kaplan, Development & Communication Associate
Print Name of Applicant and Title



agewellvt.org
Helpline: 1-800-642-5119
P 802-865-0360
F 802-865-0363
875 Roosevelt Hwy, Ste. 210
Colchester, VT 05446

September 26, 2023

BOARD OF DIRECTORS:

Dr. Allan Ramsay
(Board President)

George Beato

Patrick Brown

Meagan Buckley

John Davis

Liz Gamache

John Hammer

Constance Leach

Joan Lenes

Dan McLean

Glenn McRae

Sarah Russell

Sarah Gentry Tischler

Dr. Lynda Ulrich

Ruth Wallman

Leah Zeigler

Town of Richmond
Attn: Josh Arneson
PO Box 285
Richmond, VT 05477

Dear Josh,

Imagine if every older adult had access to the care, services, and nutrition that helped them age with confidence. With support from the town of Richmond, we are trying to do just that. For nearly 50 years, Age Well has provided services that allow aging Vermonters to stay independent and remain healthy at home, where they want to be. We excel at integrating in-home and community resources, health services, and wellness programs to enhance and improve the quality of life for Richmond residents. Over the past few years, there has been a significant increase in demand for our services, and that will continue to increase as our population grows older.

We are writing to request support from the Town of Richmond in the amount of \$3,500.00. As a nonprofit, our services are provided at no charge, and your support ensures that we are able to continue to offer care & service coordination, Meals on Wheels, Grab & Go meals, community meals, wellness programs, social activities, transportation services, expertise on Medicare, insurance, long and short-term care options, and the Helpline to residents in need.

Vermont is ranked as one of the three "oldest" state in the country and our aging population is only expected to grow, nearly doubling 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.

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,

A handwritten signature in cursive script, appearing to read "Sara Wool".

Sara Wool, Director of Development & Planned Giving



agewellvt.org
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TOWN OF RICHMOND REPORT

FY 2022 (10/1/2021 - 9/30/2022)

Last year, Age Well served 216 people from Richmond, services included:



136 calls to the Helpline



135 hours of Care & Service Coordination



1,705 Meals on Wheels delivered
45 Congregate Meals served
229 Grab & Go Meals served



55 hours of Options Counseling

29 Richmond residents volunteered over 731 hours

IMPACT

1 YEAR of Meals on Wheels equals roughly the same cost as one day in a hospital.

89% say Meals on wheels makes them feel more safe and secure while at home.

93% say it helps maintain social distancing during the COVID-19 pandemic and beyond.

ABOUT AGE WELL

Age Well, formerly CVAA, are the leading experts and advocates for the aging population of Northwestern Vermont. We believe that health happens at home and focus on lifestyle, happiness and wellness—not on age. 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.

Committed to helping individuals age well, we reduce barriers by providing access to healthy meals, in-home care and community resources. Delivered by staff members and over 1,000 incredible volunteers, our sought-after services are designed to meet the diverse needs of our clients, their families and caregivers.

We do not charge for services provided. As a nonprofit, we rely on donations and encourage clients to contribute if they are able to do so.

MISSION: TO PROVIDE THE SUPPORT AND GUIDANCE THAT INSPIRES OUR COMMUNITY TO EMBRACE AGING WITH CONFIDENCE.