

Town Of Richmond Discretionary Funding Policy Adopted by the Selectboard on 3/3/25

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. What are the reporting requirements for organizations that are awarded Discretionary Funds?

All organizations that are awarded funds must provide two reports for during the fiscal year in which they received funds. One report is due by January 15 and will provide an update on the organization's activities in the Town of Richmond from July 1 – December 31. The second report is due by August 15 and will provide an update on the organization's activities in the Town of Richmond from July 1 – June 30.

6. 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 by the Wednesday immediately prior to the second Monday in October. The application elicits information about an organization's experience, qualifications, and integrity, and the project or service for which the organizations is requesting support.

Town of Richmond

Request for Special Appropriations

Request for Fiscal Year: 2026

Organization's Name: Age Well

Address: 875 Roosevelt Hwy Ste 210

City, State, Zip: Colchester, VT 05446

Website address: agewellvt.org

A. GENERAL INFORMATION

1. Program Name: Support and Services for Older Adults

2. Contact Person/Title: Emma Kaplan, Development & Communications 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:
11,595 between July 1, 2024 to June 30, 2025

4. Total number of the above individuals who are Town residents: 114

Please attach any documentation that supports this number.

Percent of people served who are Town residents: 0.98

5. Amount of Request: \$3,500

6. Total Program Budget: 14,196,924 Percent of total program budget you
are requesting from the Town of Richmond: 0.024

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. Will the funding 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. We are asking for
the same amount this year as we did last
year .

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?_ The goal of our programs is to provide 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 enhances the quality of life and improves 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 that we will serve 120 Richmond Residents next fiscal year. Our need for services expands as Vermont's aging population continues to grow. Our programs and services are provided to those 60 years and older, or those on disability who are under 60 and qualify as Vermont Center on Independent Living (VCIL) recipients, and their caregivers in the four counties we serve: Addison ,Chittenden, Franklin, and Grand Isle.____

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 who are provided services through Age Well will have increased access to healthy meals, in-home care, and community resources, enabling them to remain healthy and independent. We market our programs and offerings through earned and paid media, and our social media channels.

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 help defray costs to provide services to Richmond residents. For example, Care & Service Coordination costs \$143.87 per hour, Options Counseling costs \$70.44 per hour, Meals on Wheels costs \$10.36 per meal, Community Meals cost \$12.03 per meal, and our State Health Insurance Assistance Program costs \$68.44 per hour.

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 Age Well's offerings in their town. The amount requested varies depending on the number of residents served from the towns, an amount anywhere between \$200 and \$15,000. Our diversified development initiatives help ensure that we avoid waitlists and continue the extensive array of services to every resident. Should municipal revenue 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, we have been a part of Vermont's Area Agencies on Aging. As the largest AAA in the state, we are on the forefront in leading the way for our aging population. We have a volunteer Board of Directors with diverse backgrounds and experience, including Richmond resident Meagan Buckley.

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 per year. We currently use ServTracker, Penelope, SAMS, and Refer databases to track, monitor, and analyze services provided. We are a OneCare affiliate, and we also benefit from the use of PatientPing to help us monitor health outcomes. _____

3. Summarize or attach program and or service assessments conducted in the past two years. _Please see the attached snapshot of our data between July 1, 2024 and June 30, 2025. Please note that our fiscal year ends on September 30th, and we will send you an updated report for the 2025 fiscal year once all the data is entered. ___

4. Does your organization have a strategic plan and a strategic planning process in place? __Yes_____ If yes, please attach your plan.

The strategic plan should include a mission statement, goals, action 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? __14_____

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. I also understand that I must adhere to all rules outlined in the **Town Of Richmond Discretionary Funding Policy, which appears as a cover sheet to this application.**

Signature of Applicant Emma Kaplan Date 9/29/2025

Emma Kaplan
Print Name of Applicant and Title



Strategic Plan

FY 2023 – FY 2025

(Year 1: FY 2023 ~ October 1, 2022- September 30, 2023)

(Year 2: FY 2024~ October 1, 2023 – September 30, 2024)

(Year 3: FY 2025~ October 1, 2024- September 30, 2025)

Version: June 27, 2022 (1), July 27, 2022(2), August 28-2022 (3) FINAL

Approved by Age Well’s Board of Directors **September 22, 2022**

Proprietary Information

Strategic Planning Process Overview:

In May of 2022, Age Well undertook a comprehensive strategic planning process. This process directly involved the Board of Directors and Leadership Team with input from staff, volunteers, and community members.

The leadership team of Age Well provided an extensive review of population projections, demographic shifts, operational statistics, external forces, financial data, including a comprehensive three- year financial model, national benchmarks; community needs assessment data and future health care and technology trends. We reviewed the needs of future generations in order to understand how innovation will be part of our work.

The assessment showed that our aging population in Vermont is growing rapidly, with the number of people over the age of 65 projected to increase by 16% by 2030. This mirrors national trends. In addition, we know that Vermont itself has the second lowest birthrate in the nation, which is declining, a trend we see reflected in our service areas, and that in the next 15 years the number of older adults over the age of 65 will outnumber those young adults aged 18 years of age or younger. Vermont is also the second least diverse state in the nation overall, with only 2.5% of our aging population identifying as BIPOC, mixed race, First Nation or Asian American (census.gov). By 2030 there will be 1.5 billion older adults globally and that will top 2 billion by 2040 (un.org) so we know that the older adult population will have a tremendous influence on the care and services we will need to provide in the future.

Opportunities include balancing our mission with the need for new growth, and revenue diversification in order to remain sustainable after COVID-19 funds sunset in 2025. Significant workforce challenges and inflation post pandemic are creating financial hardships in every community therefore our ability to be proactive now to manage our financial position over the next three years is paramount to our ongoing success. Sustainability models will be a top priority, including improved efficiency to support long- term operations as well as focusing on environmental sustainability and our carbon footprint. Investing in our culture of engagement and embracing diversity, equity and inclusion as principles for ongoing agency development emerges as a priority especially as we invest in our workforce. Continued work on implementing fee –for- service programming, new contracts, targeted philanthropic goals to support financial diversification was highlighted. Innovation and digital inclusion strategy will also be a key focus as we leverage technology to drive our services and results over the next three years.

Leadership took that information and developed a draft of the strategic plan. This document (will be) discussed with the Age Well Strategic Directions Committee of the Board, the full Board of Directors, the Staff, Age Well Volunteers and our Advisory Council. It (will be) was also discussed at Department Meetings, and All Staff Meetings. The input gathered on the draft was incorporated into the final document (to be) approved by the Age Well Board by September 22, 2022.

Age Well's Mission, Vision, and Values

Age Well's Mission

Age Well's mission is to provide the support and guidance that inspires our community to embrace aging with confidence.

Age Well's Vision

Age Well aspires to use our Vermont experience to be a nationally recognized and collaborative leader in the aging network promoting healthy aging, independence, dignity, and personalized choice for older adults.

Age Well's Values:

- ***Our People:*** We will promote and maintain a culture in which our employees feel their work is valued, supported, connected to purpose and inspirational. We will welcome the diversity in our employees, volunteers, clients and communities and we will be inclusive of all.
- ***Financial Strength and Long- Term Sustainability:*** We will create new means to support and maintain our financial strength, so we remain sustainable for our future. This not only includes new financial and/or network based, contracts, and fee for service programs, but also a focus on our sustainable environment, our carbon footprint and implementing tools to create efficiencies.
- ***Innovation and Digital Inclusion:*** We will advance creative digital solutions and innovations focused on managing the social determinants of health and other barriers that influence the populations we serve. We are bold, courageous, and adaptable as we advance new solutions to support our clients.
- ***Learning, Engaging and Empowering:*** We will collaborate with community partners and peers to promote and support client independence, overall population and health and wellness through quality strategies that address the social determinants of health. We will embrace and celebrate the diversity of our staff, clients, volunteers and communities through the principles of equity and inclusion.
- ***Integrity, Kindness, Generosity, and Compassion:*** We will advance our mission with integrity, kindness, generosity, and compassion. This means we will communicate openly and transparently, and we will continue to build a culture of engagement that is client centered and mission focused.

Critical Issues & Strategic Priorities:

Based on the findings of our environmental assessments, surveys and feedback during the planning process, five Strategic Priorities will be addressed, with linkages to our Strategic Indicators and Dashboard of Outcomes.

- **Diversity in Our Workforce: “Recruit-Retain-Develop”** Age Well will respond to the needs of our staff, volunteers and client population through a fully engaged organizational culture and a mission of excellence. We are an employer of choice that will recruit and retain diverse top talent while developing leaders of the future. We celebrate and value the diversity of our staff, volunteers, clients and communities and we will be inclusive of all.
- **Finance, Sustainability and Integration:** Age Well will be sustainable and we will enhance our ability to meet the needs of our customers and communities by being agile and financially responsible. We will create long- term sustainable and targeted growth through capital development, acquisitions and diversification of our revenues. We will build a strong and integrated network of services across the state and beyond. We will enhance efficiencies, strengthen our revenue profile, and maintain a strong balance sheet. We will implement an environmental sustainability plan to reduce our carbon footprint that will support long-term growth and efficiency while caring for our environment.
- **Efficiency, Value and Operational Effectiveness:** Age Well believes that our clients are at the center of all we do. We will deliver person centered, high quality and evidence-based care and service models as a leader in our field. As we focus on the quality of our service, our positive outcomes will be evident. Our programs will advance the health and wellness of our clients to support overall population health and health reform strategies.
- **Innovation, Digital Transformation and Inclusion:** Age Well will continue to develop and invest in robust technology to support future creative innovations that will serve our clients in new ways. We will adopt cutting- edge technology and tools to help us advance our mission with efficiency in mind. We will transform our digital capability to enhance the services we provide to our clients to be inclusive and innovative.
- **Advancement and Philanthropy:** In order to fortify our revenue streams, we will invest in our development team to advance our bold philanthropic goals for Age Well.

Strategic Initiatives address each of the Critical Issues and each one assigned a priority level based on its anticipated impact. A Leadership Team member carrying primary responsibility for its implementation is assigned along with an anticipated completion date. That detail is reflected in the planning grids which begin on page 5 of this document.

Strategic Indicators & Goals for 2023-2025

Age Well has identified a small group of critical high-level measures which serve as the Strategic Indicators of overall organizational performance. These are grouped into the categories of: People, Finance, Quality/Satisfaction, Efficiency /Value. For the FY2023-2025 Strategic Plan, we have identified specific goals for each of the Strategic Indicators that we believe we must achieve by the end of each Fiscal Year. Where applicable, we have also identified the relevant national benchmark to provide additional perspective. These measures are reported to the Board on a regular basis to facilitate the tracking of progress and organizational performance. They are included in this plan on the Dashboard of Strategic Indicators, found on page 11 of this document.

Age Well’s mission is to provide the support and guidance that inspires our community to embrace aging with confidence.

<i>Critical Issue 1:</i> Our Workforce: “Recruit-Retain-Develop”	<i>Strategic Initiatives:</i> <i>Age Well will continue to invest in and build a strong, diverse and vibrant workforce in an engaged and positive work culture. We will be strategic as we recruit, retain, and develop the best talent while developing our future leaders. We will embrace and celebrate the diversity of our communities, staff and volunteers through the advancement of principles of equity and inclusion for all. To do this, Age Well will:</i>	<i>Priority</i> <i>(H=High</i> <i>M= Med</i> <i>L= Low)</i>	<i>LT Member</i> <i>With Primary</i> <i>Responsibility</i>	<i>Target</i> <i>Date</i>	<i>Actual</i> <i>Completion</i> <i>Date</i>
Tasks/Tactics	Develop a robust Wages/Benefits/Compensation program for Age Well. This may include: <ul style="list-style-type: none"> - Remote work/alternative work models - Competitive compensation reviewed on annual schedule that includes adjustments for advancement toward certain professional degrees e.g., BSW, MSW, MSN - Workforce wellbeing programs and benefits 	H	Jason, Chris	2023-2024-2024	
	Invest in Staff and Leadership Development and develop a formalized succession preparedness plan for future leadership roles at Age Well.	M	Jason	2024	
	Proactively engage in the recruitment and retention of students and interns through formalized university and college pipelines and agreements.	H	Erin, Erica, Chris/Tim	2023	
	Formalize a staff development plan for professional growth and include a tuition reimbursement model in Year 1. Expand on current online programs to offer additional education and advancement opportunities for current staff over the three-year plan. This may include: <ul style="list-style-type: none"> - Online courses (e.g., Knowledge Wave, KnowB4) - Boston University CADER program certifications - Other certification programs - Contracts with universities and colleges for BSW or MSW programs 	H	Jason/Annick/ Lisa	2023 2023-2024-2025	
	Develop a two- year plan to achieve Best Places to Work Designation.	H	Jason	2024	

	<p>Advance and implement a three-year plan to support Diversity, Equity and Inclusion in our workplace. This may include:</p> <ul style="list-style-type: none"> - Training programs for cultural sensitivity - Education about Deaf, Hearing Impaired/Hard of Hearing individuals - Inclusive hiring practices- Employees and Board of Directors - Physical plant layout and ADA equipment that supports disabled or mobility impairments 	H	Erica/Tracey/Jason/Annick	2023-2024-2025	
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<u>Critical Issue 2:</u> Finance, Sustainability and Integration	<i>Strategic Initiatives:</i> Age Well will invest in programs that support long- term sustainability and financial growth, including new fee –for- service models, and broader network integrations. We will also be mindful of our environment. We will invest in renewable resources to help to reduce our carbon footprint while generating benefits for our agency. To do this, Age Well will:	Priority (H=High M=Med L=Low)	LT Member With Primary Responsibility	Target Date	Actual Completion Date
Tasks/Tactics	Develop a 3-year strategic and financial plan for an Age Well integrated and transformative Network-based model that is designed for shared savings, that results in improved efficiency and integration within the ‘aging system’. Achieve Board of Director’s approval for the Plan to Plan. The model may include affiliations with: - Area Agencies on Aging (AAA) - VASCAMP (Senior Centers) - Adult Days - Other non- profits (e.g., Transportation, Housing)	H	Jane/Amy	November 2022	
	Create a robust and inclusive implementation and communications plan specific to the Network model. Launch the plan.	H	Jane/Amy/Tracey	October 2022 - April 2023	
	Launch the Network plan and implement Year 1 of its 3-year strategic plan.	H	Jane/Amy	May 2023- May 2024	
	Implement new contracts and private pay/fee-for-service models over the next 3 years to improve revenue streams and diversification at Age Well. Contracts and grants may include: - Payers and Statewide contracts - New business lines - Nutrition/Medically Tailored Meals and Care Management programs	H	Amy/Jane	2023-2024-2025	
	Develop and implement a plan to reduce Age Well’s carbon footprint for ongoing environmental sustainability. This may include: - Advancing solar and/or EV features at our owned buildings - Efficiency Vermont investments - Leed v4 certification for O&M	M/L	Amy/Jason	2025	
	Implement year over year efficiency savings by targeting process improvements in each department. Budget for targeting savings.	H	Amy/Tim/Matt C.	2023-2024-2025	

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<i>Critical Issue 3:</i> Efficiency, Value, Operational Effectiveness	<i>Strategic Initiatives:</i> <i>Age Well believes that our clients are at the center of all we do. We will deliver person centered, high quality and evidence-based care and service and be a leader in our field. As we focus on quality of service, our positive outcomes will be evident. Our programs will focus on efficiency, value and operational effectiveness to advance the health outcomes of our clients. To do this, Age Well will:</i>	<i>Priority</i> <i>(H=High</i> <i>M=Med</i> <i>L=Low)</i>	<i>LT Member</i> <i>With Primary</i> <i>Responsibility</i>	<i>Target</i> <i>Date</i>	<i>Actual</i> <i>Completion</i> <i>Date</i>
Tasks/Tactics	Achieve NCQA Accreditation of Case Management for Long Term Service and Supports.	H	Erin/Jane	November 2023	
	Secure a contract with DAIL to continue providing Medicaid funded case management services for Conflict Free Case Management (strategies may include many of the below tactics). Plan to build capacity should Age Well’s client caseload increase.	H	Erin	October 2024	
	Implement at least 2 new grants, pilots or contracts per year that advance evidence-based programs or promising practices that impact the health outcomes of Age Well clients. Contracts could be with entities such as ACL, DAIL, VDH, private businesses, or Payors. Grant/Contracts should be targeted towards key issues affecting older Vermonters such as: <ul style="list-style-type: none"> - Food Insecurity - Social Isolation - Disease Management - Intergenerational or Mentorship Programs - Caregiver Support - Transitions of Care - Falls Reduction 	H	Erin, Chris, Erica, Tracey	2023-2025	
	Seek out annual opportunities for state and national recognition for best practices and innovative programs. These opportunities could include: <ul style="list-style-type: none"> - National or Local Awards - Presentations at National Conferences 	H	Erin, Chris, Erica	2023-2025	

Column A - Strategic Plan

Critical Issue 4: Innovation, Digital Transformation and Inclusion	Strategic Initiatives: <i>Age Well will continue to invest in new technologies and innovations to expand our digital platform. We will focus on using technology to support our mission, the clients we serve and to advance cutting edge thinking to create new efficiency. To do this, Age Well will:</i>	Priority (H=High M=Med L=Low)	LT Member With Primary Responsibility	Target Date	Actual Completion Date
Tasks/Tactics	Continue to develop integration strategies for technology platforms while continuing to sunset older/obsolete technology.	M	Tim	2023-2024-2025	
	Update IT Strategic plan yearly. Evaluate how to ensure all older adults in our service area have access to technology by 2025.	H	Tim	2023-2024-2025	
	Evaluate how to ensure all older adults in our service area have access to technology by 2025.	M	Tim	2025	
	- Evaluate the Peer Place documentation system, to align IT with all other AAA's. Determine if we adopt Peer Place and create an implementation plan.	H/M	Tim, Erin, Chris	Dec 2022-March 2023	
	Evaluate in-home electronic healthcare aids and digital inclusion for Age Well clients. This may include: - Telehealth - Tablets - Alexa/Siri/Google/Voice Assistants - Health/Social Robots - Pilot a program with Verizon or VT Assistive Technology Program	M	Tim, Erin, Erica	Dec 2024	
	Advance and promote technology with our community partners. This may include: Implementing devices at Senior Centers Implementing IT/Resource Kiosks with local community partners (libraries, grocery stores) Implement digital signage to share Age Well resources and information (e.g., QR codes/applications)	H	Tim/Chris/Tracey	2023-2024-2025	
	Evolve and implement our Data Management Strategy. This may include: - Implementing data driven decision making tools - Documenting clean data auditing standards Data Warehouse/Data Fabric/Data Mesh implementation	H	Tim/Matt C.	2023-2024	
	Incorporate Chat Features and Online ordering/ticket functions into our new website.	H	Tim/Chris/Tracey/Erin	2023	

Age Well's mission is to provide the support and guidance that inspires our community to embrace aging with confidence.

<i>Critical Issue 5: Advancement and Philanthropy.</i>	<i>Strategic Initiatives:</i> In order to fortify and diversify our revenue streams, we will invest in our Development team to advance our bold philanthropic goals for Age Well. <i>To do this, Age Well will:</i>	<i>Priority (H=High M=Med L=Low)</i>	<i>LT Member With Primary Responsibility</i>	<i>Target Completion Date</i>	<i>Actual Completion Date</i>
Tasks/Tactics	Develop a 3 year-Strategic Philanthropic Plan that includes a strategy to acquire large donors (> or =\$25k) and targeted fundraising goals each year for the next three years e.g., > or = \$1.5M by 2025. This may also include: <ul style="list-style-type: none"> - Large grants and new contracts against targeted fundraising goals each year. - New Corporate Partnerships - Celebrity endorsements/Co-branding opportunities - Stewarding and segmenting donors to bring to higher levels of giving - Board and CEO leadership and defined goals for annual fundraising efforts 	H	Sara/Jane/Tracey	2023	
	Pursue strategic investments in staffing to include a new Development /Major Gifts /Planned- Giving organizational strategy.	H	Sara/Tracey	2023-2024	
	Explore innovative donor stewardship models and implement annual stewardship plan. This may include: <ul style="list-style-type: none"> - Matching gifts through corporations, - Donor advised fund, gifts of stock and alternatives vehicles of giving - Focus on reaching a new group /generation of donors e.g., Gen Z and Millennials 	M	Sara/Tracey	2023-2024	
	Expand outreach strategy using multi- media content for fundraising.	H	Sara/Tracey	2023	

**Attachment A:
Dashboard of Strategic
Indicators**

People	Current Data (as of September	Goal for 2023
Employee Turnover Rate	23.5% (cumulative)	< or = 15% per year (47.2% National Average)
Volunteer Satisfaction Rate	99%	> or = 95%
Volunteer Retention Rate	96%	> or = 95 %
Finance	Current Data (as of September 2022)	Goal for 2023
Net Operating Margin	7.9% (July 31)	➤ Or = Budgeted Margin (1.5%)
Days Cash on Hand	50 (July 31)	➤ Or = Budgeted Days Cash (45 Days)
Number of New Contracts /Fee for Service Programs	TBD	➤ Or = to 2
Fundraising Target	845k	Meet /Exceed Budgeted Goal
Quality/Satisfaction	Current Data (as of September 2022)	Goal for 2023
Client MOW Satisfaction Rate > 92%	93% (average)	➤ Or = 92%
Statewide Respite Volunteer Program Meets all Goals	-	➤ Or = 90%
NCQA Certification for Care Management Achieved	-	➤ Met
Client Hospital or ED Visit Reduction in 1 year as a result of CAPABLE program	-	< or = 1 visit/Client
Efficiency/Value	Current Data (as of September 2022)	Goal for 2023
Aging Network Integration Advancement Meets Targets	-	➤ Met

Age Well’s mission is to provide the support and guidance that inspires our community to embrace aging with confidence.



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

September 29, 2025

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



BOARD OF DIRECTORS:

Sarah Gentry Tischler
(Board President)

George Beato

Patrick Brown

Meagan Buckley

Liz Gamache

John Hammer

Joan Lenas

Dan McLean

Glenn McRae

Dr. Allan Ramsay

Susan Murray

Dr. Paul Reiss

Sarah Russell

Leah Zeigler

Dear Josh,

Since 1974, Age Well has provided the compassion, support, and services to Richmond's aging population that helps them stay independent in the community they love. Whether it's Meals on Wheels, in-home care coordination, caregiver support, or wellness programs, we know that health can happen at home. Age Well is here to enhance and improve the quality of life for Richmond's residents.

As a rapidly aging population turns to us for services we must continue to meet increased needs and forge ahead with confidence in an ever-changing landscape. **Between July 1, 2024 and June 30, 2025, we provided services valued at over \$101,964 to 114 Richmond residents.** As a nonprofit, these services are provided at no charge, and with your support, we will continue to ensure that our aging neighbors receive the support they have come to rely upon.

As such, we are writing to request continued support from the Town of Richmond in the amount of \$3,500. Last year, you were able to allocate \$3,500 to Age Well. Your partnership ensures that our vast array of supports, including; care & service coordination, Meals on Wheels, community meals, wellness programs, social activities, transportation services, expertise on Medicare, long and short-term care options, and the Helpline will continue to be available to residents in need.

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

Sincerely,

Emma Kaplan, Development & Communications Associate
ekaplan@agewellvt.org | 802-662-5275

TOWN OF RICHMOND REPORT 7/1/2024 - 6/30/2025

Between July and June, Age Well served 114 individuals from Richmond, services included:



137 calls to the Helpline



384 hours of Case Management



2,464 Meals on Wheels delivered
84 Congregate Meals served
69 Grab & Go Meals served



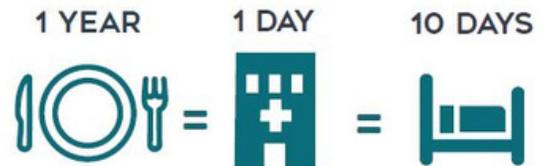
20 hours of Options Counseling

39 Richmond residents volunteered over 860 hours

COST BREAKDOWN OF OUR SERVICES

Age Well services are provided at no cost, but we want to emphasize the value we provide to your community. Between July 2024 and June 2025, we delivered services valued at \$101,9654 to Richmond residents.

State Health Insurance Program: \$68.44 per hour
Case Management: \$143.87 per hour
Options Counseling: \$70.44 per hour
Information & Assistance: \$35.69 per hour
Meals on Wheels: \$10.36 per meal
Congregate Meals: \$12.03 per meal
Grab and Go Meals: \$10.37 per meal
Volunteers: \$15.33 per hour



MEALS ON WHEELS CAN SERVE A PERSON FOR AN ENTIRE YEAR FOR ABOUT THE SAME COST AS JUST 1 DAY IN A HOSPITAL OR 10 DAYS IN A NURSING HOME

ABOUT AGE WELL

Since 1974, Age Well has provided Vermonters with the necessary support to manage their daily living needs, with the goal of keeping them active, healthy, and independent. As the leading experts and advocates for the aging population, we believe that health happens at home and focuses on lifestyle, happiness, and wellness—not on age.

Committed to helping individuals age well, we reduce barriers by providing access to healthy meals, in-home care, expertise on Medicare and insurance, long-term and short-term care options, transportation to medical appointments, translations services, a Helpline, and many more community resources in Addison, Chittenden, Franklin, and Grand Isle Counties.

As a 501(c)3 nonprofit, we do not charge for our services. 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.