COMMUNITY INNOVATIONS FOR AGING IN PLACE (CIAIP) GRANTEE CASE STUDY

REACH:
VERMONT RURAL ELDER ASSISTANCE FOR CARE AND HEALTH

A PROJECT OF
THE CITY OF MONTPELIER
MONTPELIER, VT

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One Reach member providing a service to another.
BACKGROUND

The increasing population of older Americans necessitates an expansion in programs and services that are responsive to their priorities and needs.\textsuperscript{1-3} Given the challenges of independent living for those with suboptimal health and/or functioning, programs that facilitate aging in place represent an important component of a responsive service system.\textsuperscript{4} Such programs remain novel,\textsuperscript{5} with much to be learned at both the local and national level—including identification of best practices for direct service delivery, as well as approaches that promote systemic solutions and community-wide changes. Community Innovations for Aging in Place (CIAIP) was funded from 2009 to 2012 by the United States Administration on Aging (AoA) in response to the need for systemic and integrated responses to shifting demographics. Through CIAIP, demonstration projects were funded in fourteen sites around the country. In addition, the Center for Home Care Policy and Research (CHCPR) of the Visiting Nurse Service of New York (VNSNY) was chosen as the Technical Assistance Grantee (TAG), which included VNSNY staff and consultants, to provide training and other supports focused around program design, program implementation, communication, and evaluation (see Table 1 for listing of sites and TAG.)

This case study report is one in a series of six case studies developed by the TAG. The case studies describe program models, challenges, and lessons learned for organizations and funders seeking to develop aging in place programs, as well as others with interest in the topic. Data for this and other case studies was gathered primarily through site visits and in-person interviews and discussions with program staff and stakeholders. Depending on the site, stakeholders included some combination of clients, partners, Advisory Board members, and community members with interest and expertise in issues related to aging in place. Additional information came from reviews

* The data collection was approved by the Institutional Review Board of The New York Academy of Medicine, a member of the VNSNY TAG.
of program documents including project proposals, reports, and Reach materials.

CIAIP grantees developed a range of program models and specific services. For the purpose of the case studies, they could have been grouped and categorized along a number of dimensions. The framework we utilized focused on a grantee’s overall approach and delineated five overarching themes:

1. Broad based community development and planning
2. Service provision in settings where older people live and congregate
3. Building bridges across program and organizational “silos”
4. Mobilizing human and social capital through volunteering and advocacy
5. Reaching out to and engaging specific groups of overlooked or disenfranchised older adults

Reach (Rural Elder Assistance for Care and Health), originally a project of the city of Montpelier, VT, is an example of the fourth listed approach. Based in Montpelier, Reach is a service exchange network. It uses a Time Bank model, which has been adapted in the hopes of more reliably serving the needs of older adults and individuals with disabilities. Reach coordinates and facilitates a set of services and activities, which are provided by and for community members. Time spent in services and activities is “banked” and can be redeemed for services offered by other program members. Consistent with other Time Banks, Reach does not replace the mainstream monetary system or established social services. Instead, it complements them, by facilitating the delivery and exchange of additional services with little or no financial implications, while at the same time promoting the social engagement of community members and encouraging greater social cohesion through volunteerism and one-to-one interactions.

LITERATURE REVIEW

First developed and implemented in the 1980s, there are now hundreds of Time Banks across the United States, the United Kingdom, Spain, and elsewhere. Time Banks operate as service exchange networks, with an underlying value system that emphasizes the inherent worth of all participants and an interest in promoting “co-production” among individuals who had previously been on the receiving end of services. Within the

* Including New York City; Ithaca, NY; Lehigh Valley, PA; Denver, CO; and Madison, WI
Time Bank model, all members work (or produce), and all work has equal worth. Services are valued by the time committed to them, rather than by the education or experience required. Although in some ways similar to a barter system, Time Banks do not require one-to-one reciprocation. A network member may provide services to one person (or organization) and receive services from another, thereby easing the exchange process while facilitating an expansion in social ties.

The Time Bank model has many intellectual and financial supporters, who see within it potential for a broad range of benefits, particularly for communities with high unemployment rates, and for low-income, isolated, and older adult members. These benefits include:

- Increased access to needed services that may be unavailable or unaffordable otherwise;
- Expanded motivation and opportunities for community members to remain productive and expanded appreciation and utilization of a diverse range of skills and experience;
- Opportunities to support and contribute to individual community members and community organizations;
- A mechanism for the expansion of social networks and social cohesion with repercussions for physical and mental health, health service utilization, quality of life, and community capacity.

However, along with the benefits, Time Banks present a number of challenges, including administrative costs and—in some cases—insufficient levels of activity to meet member needs. Programs targeting older adults and other potentially vulnerable populations face additional challenges, including a possible mismatch in service needs and services available as well as security concerns. Reach was developed in hopes of optimizing the strengths of a Time Bank model, while addressing the well-recognized challenges. Reach practices and lessons learned may therefore be informative to other organizations attempting to develop Time Banks that meet the particular needs of older adults.

**REACH PROGRAM DESCRIPTION**

*Reach Service Exchange Network is a growing collection of people of all ages who have come together to create a community in which people care for one another by*
exchanging time, skills and talents. Our members trade services that improve their quality of life, health and well-being and promote community engagement. These are not people who necessarily know each other beforehand, but they are your neighbors; just regular Vermonters who know that neighbor helping neighbor is how a community remains strong, vibrant and sustainable. (Reach Service Exchange Network website: http://Reachvt.org/)

Overview

Vermont Rural Elder Assistance for Care and Health (Reach) was initiated by the Planning and Community Development Department of the City of Montpelier. More recently, it became a program of the Onion River Exchange (ORE), an organization with a mission to foster community well-being through an exchange network of services and goods that strengthens social cohesion, encourages reciprocity, enhances the local economy, and is built on a foundation of respect and equality. ORE was developed with a traditional Time Bank model, whereby exchanges are conducted using a (basically) free market system, with minimal assistance in the coordination of exchanges and no assurance that a particular service will be available. Recognizing that such a model may not effectively meet the needs or the capabilities of older adults and people with disabilities, Reach was designed as a supplemental program within ORE that offered a number of administrative supports to facilitate a more comprehensive, proactive and secure system of exchange. As described in more detail below, these supports include:

- Assistance with the identification of exchangeable skills, development of exchanges, and logging hours into the internet-based tracking system, “Community Weaver;”*
- Member background checks;
- Linkages with community organizations; and
- Referrals within the formal service delivery system.

In providing these service enhancements, Reach aims to meet the particular needs of older adult and disabled members, while promoting enhanced social engagement and an improved quality of life for the community overall. In addition, Reach aims to increase the proportion of

* Community Weaver is an online system provided by TimeBanks USA, which allows remote searches for and posting of services and requests, as well as remote logging of hours.
services available in the community that do not require a monetary payment and build the infrastructure necessary to offer services using both traditional (i.e. money, health insurance) and non-traditional (i.e. time) payment systems. The reciprocal exchange process is targeted toward five priority areas: In-home care, transportation, preventive health education, civic and social engagement, and life-long learning. Reach does not aim to replace or compete with the regular payment system, but rather to supplement it:

The mechanics of it are that you create a system whereby people can exchange volunteer services. And it’s a very egalitarian system. That is that one hour is worth an hour of service, regardless of the prevailing labor rate for that service. So if I shovel your walk and I would get $10 an hour. And you give me a massage and you would get $30 an hour. Well, tough luck. I give an hour [and] get an hour. (Reach staff)

The Reach program has included ongoing monitoring and evaluation. Members were surveyed twice, on topics that included health, social well-being, in-home care, caregiver-related issues, income and housing, and satisfaction with the program—including perceived strengths and weaknesses. In addition, Reach staff tracked the number and type of exchanges logged, as well member characteristics, so as to assess progress toward proposed program objectives.

Logistics and Operations

Individuals interested in joining Reach are asked to complete a membership packet; attend an in-person orientation session; agree to a criminal background check and, if a volunteer driver, a motor vehicle record review. The assurances are considered essential by staff and members alike, given the Reach mission of serving vulnerable members of the community. All ORE (including Reach) members are requested, but not obligated, to pay an annual membership fee ($25 per individual, $40 per household). Although there is no minimum requirement for frequency of exchange, there is an expectation that “regular” exchanges will occur—at least four hours per month. Reach also offers organizational memberships. Organizational members, which include Central Vermont Home Health and Hospice, HomeShareNow, RSVP Volunteer Center, Vermont Center for Independent Living, and Green Mountain Film Festival, promote and provide referrals to Reach, provide opportunities for Reach members to volunteer and accumulate credits, and offer direct services to Reach members.
The voluntary exchanges represent the core of the Reach model; however, a relatively substantial organizational infrastructure is essential for the support and maintenance of the program and to promote its effective use. During the CIAIP grant period, Reach had a staff of 3.5 full time equivalent staff members, including a Project Director, a trained social worker who serves as a Member Navigator, an Outreach Director, and a Project Development Specialist. After the CIAIP grant ended, Reach members took on a number of staff responsibilities, and received credit (in hours) for services provided to the program. An Advisory Board has provided guidance and promotional support, and acts as a sounding board regarding program direction and the resolution of challenges. Day to day work that has been necessary for the development and functioning of Reach includes:

- **Communications**: Including the development of a clear service model and simple messaging to describe the program and to differentiate it from a general Time Bank model. Clear messaging has been necessary so that potential (and current) members and partners fully understand the expectations and benefits of participation. Orientation materials and a member handbook provide more detailed information on organizational mission, program guidelines, and a variety of operational matters.

- **Outreach**: A multi-faceted and ongoing effort, including presentations to individuals and organizations, recreational and social activities, member ambassadors, meet-ups, and online networking. Through these outreach activities, Reach has worked to gather a critical mass of members with a variety of skills and the motivation to make exchanges on a regular basis.

- **Member support**: An experienced and savvy Member Navigator to proactively identify “exchangeable” knowledge and skills, facilitate exchanges, make referrals for the needed services that are beyond the capacity of Reach members, and assist members with the Community Weaver software used to manage the membership and exchange database. The Member Navigator may also be called upon to mediate exchanges with divergent or unrealistic expectations and to counsel regarding “legitimate” exchanges.

*I see a lot more exchanges happen when I really have the time to really sit down—and when a new member comes in and they need grocery shopping—the next new member that comes in that lives in their area,*
trying to get those two together immediately, instead of just putting it on Community Weaver and crossing my fingers that they’re going to find each other. (Reach staff)

- **Enrollment**: Management of the enrollment process, including orientation, the criminal background checks required of all Reach members, and the motor vehicle record review required of volunteer drivers.
- **Partnering**: Promotion and support of linkages with partner organizations that provide services to (including outreach opportunities) and/or would benefit from the services provided by Reach members.

**ACCOMPLISHMENTS**

Although still a work in progress, Reach has developed and implemented a mission driven and innovative model that may facilitate improved quality of life and stability for disabled and older adults, while promoting positive community experiences and relations for all. Its successful incorporation within ORE suggests a potential for stability and sustainability that seemed elusive at the start. As described below, specific Reach accomplishments include: (1) the provision of direct services, and (2) increased social engagement and social cohesion among different segments of the community, as well as support for vital community organizations providing both social and cultural services. Although seemingly disparate, these two areas of accomplishment are intertwined within Reach’s ultimate goal of enhancing and supporting community—for older adults and others—through the voluntary exchange of wide ranging services.

(1) **The provision of direct services**: As of October 2012, Reach had 307 members and has facilitated the documented exchange of over 6,700 hours of service. Actual hours of service is estimated to be significantly higher, as underreporting of exchanges is reported to be very common (either because people don’t want to bother, don’t want to “charge” for services, or establish a relationship outside of the Reach system). Although services that require certification and/or licensing (e.g. electrical work) are unfortunately not readily available for exchange, the list is both extensive and creative, reflecting very basic needs, as well as more abstract individual and community concerns and interests.
The way it works now is that people exchange every imaginable kind of service. There are a couple of reasons for this. One is that sometimes elders, or people with disabilities, don’t have a lot of physical services to offer because they’re frail. But they can offer conversational French and they can teach you how to crochet...so you pull those people in and you value those resources. (Reach staff member)

Exchanges have included both individual and community services, as described below. The community service exchanges support local organizations. They also provide opportunities (e.g. making phone calls from home, folding brochures, stuffing envelopes) to individuals that may not have the skills or mobility to provide a requested service to another community member.

<table>
<thead>
<tr>
<th>Individual Services</th>
<th>Community Services</th>
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<tr>
<td>• Transport for medical appointments,</td>
<td>• Volunteer for local community</td>
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<tr>
<td>errands, and recreation</td>
<td>organization, doing clerical work,</td>
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<tr>
<td>• Housekeeping services, including basic</td>
<td>phone calls, “tabling,” and</td>
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<tr>
<td>cleaning and laundry</td>
<td>organize/participate in</td>
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<tr>
<td>• Household maintenance and repair,</td>
<td>community talent show</td>
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<td>inside and out</td>
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<tr>
<td>• Snow removal</td>
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<tr>
<td>• Music lessons</td>
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<tr>
<td>• Language lessons</td>
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<tr>
<td>• Grocery shopping</td>
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<td>• Computer support</td>
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<td>• Meal preparation</td>
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<td>• Tax assistance</td>
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<td>• Massage</td>
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<td>• Nutrition counseling</td>
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<td>• Exercise class</td>
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<tr>
<td>• Low vision support (e.g. reading mail,</td>
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<td>internet search)</td>
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<tr>
<td>• Sewing/mending</td>
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<td>• Plumbing</td>
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<td>• Moving</td>
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<td>• Hair cut</td>
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<td>• Companionship</td>
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<tr>
<td>• Oral history</td>
<td></td>
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<td>• Dog walking</td>
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</table>
The broad range of *Reach* services provide valuable assistance to older and disabled community members and—at an individual level—contribute to their ability to remain in their homes. An older adult member living with severe back pain commented:

> For me it was financial. I used to pay someone to come and clean my house and shovel the walk and do various things. I can’t do that anymore. I just don’t know what I’d do if I didn’t have this time bank. I feel as though I’m giving, I’m participating, and I’m getting what I want.

(2) **Increased social engagement and social cohesion among different segments of the community**: Beyond the direct services that are the nuts and bolts of *Reach*, the underlying ethos is what gives the program its unique character. The system of exchanges, which brings together strangers of different ages, abilities and life experiences, has created lasting relationships, learning opportunities, and increased social engagement in *Reach* and other community activities. The program has given members opportunities to apply their talents to support individuals and the community overall:

> Giving is really important when you are aging too. That you still have something to give and that’s why Reach is really different. It says that everyone has something to give. *(Reach member)*

> Elders I find, if they’re doing really well, tend to fall into “just giving.” I have a couple of folks who just want to help other people, which is fine. One person that is doing that donates their hours to the Berry Senior Center... so they’re giving twice. They’re giving to the person that they’re helping, and instead of using their hours themselves, they’re giving to an organization that they know and love. *(Reach staff member)*

A visually impaired member, who has used *Reach* credits for food shopping, moving, assistance reading mail, and Internet searches, accumulated credits by developing a variety show:

> I organized a variety show for people with disabilities. So, there were fourteen performers with many different types of disabilities, both mental and physical—doing everything
from stand-up comedy, there was one that did some theater skits... We had many different types of music and a poetry reading...I didn’t want to have an admission charge because I thought a lot of people with disabilities don’t have money. 
Transportation is hard enough. If you add money on top of that they’re just not going to come... We got 80 people. The main thing was giving the performers a chance to be on stage. Since it’s so isolating, I’m sure this is something that people with disabilities and seniors have in common: feeling of isolation. They were beaming. There was one person with autism and he wrote some stories using this thing called facilitated communication...We were thinking he can’t really read in public. We were wondering should we get somebody else to read it for him. But we ended up deciding just to have his computer read it...it also gave you a little taste of what his life is like.

(3) **High levels of satisfaction among members:** According to a survey conducted by *Reach* in August 2012, 89% of members would definitely recommend *Reach* to others, with another 9% reporting that they probably would recommend *Reach*.

(4) **Recognition in the national and local media:** including the *New York Times*, the Montpelier local newspaper, and local radio appearances.

**CHALLENGES AND SOLUTIONS**

As an innovative model that promotes previously untested policies and practices, *Reach* staff have faced a number of challenges, several of which may provide valuable lessons to others hoping to develop similar programs.

- **Engagement:** *Reach* aims to become a reliable service delivery system for disabled and older residents of Montpelier and surrounding communities. To meet this aim, *Reach* must engage a critical mass of community members willing and able to make relatively frequent exchanges—yet, it is difficult to motivate high levels of participation at the early stages of the project, when opportunities for exchange are too limited. In addition, *Reach* is based in a small city in a largely rural state; low population density added to the challenge of building critical mass. Finally, there are the specific challenges of attracting older people who
do not identify as “older” and attracting younger people with the needed skills and experience.

*You have to have a certain base of healthy active people – to fill some of the needs of the infirm elderly people... I might need my driveway shoveled but I’m not going to get another 80 year old to do it.* (Older adult member)

*Reach* staff and advisors considered a number of approaches to balance the priorities of different populations, including a dual fee structure, with higher fees used to facilitate improved access to services. These alternative models were not deemed acceptable or feasible and were dismissed. Although reliability in service delivery is not yet assured, aggressive outreach, proactive organization of exchanges, and referrals to existing service providers resulted in greater security within the system. Housing *Reach* within ORE also increases the likelihood that needed services will be available. In addition, focusing on specific concerns, such as care giving, rather than specific populations, was identified as more effective for outreach and service delivery—and for fundraising—in that the specific needs and capacities were made more clear.

- **Service Delivery**: With the ultimate goal of helping disabled and older adults remain in their homes, a number of basic services must be available through *Reach*, including help with housekeeping, home maintenance, and other instrumental activities of daily living. Such services are available through the program, but seemingly not in sufficient supply. Also, as mentioned in a prior section, pro-active efforts are required to identify services that can be provided by high need members, so they have sufficient opportunities for exchange.

- **Messaging**: *Reach* does not provide a new set of direct services; rather it provides a new method for accessing, organizing and promoting talents and services that were—for the most part—already available in the community. Consequently, there are challenges around messaging, coordination, and competition that must be carefully addressed so that people understand and can appreciate (and not be threatened by) the value added in such a model. Collaboration is necessary to bring the program to scale. Because collaboration requires efforts from both sides, the value of the program must be clear to potential partners.
• **Sustainability**: Although the hope was that *Reach* would be financially sustained through member dues, this proved unrealistic. There were not a sufficient number of people willing to pay for the service and the costs of administering a payment plan was considered too high for the anticipated return. Increasing member responsibility for administrative tasks has helped to sustain the program. In addition, the program has been successful in accessing grant support to ensure that the needs of the target population are addressed.

**SUMMARY AND LESSONS LEARNED**

*Reach* is an innovative program that came into Montpelier with champions and detractors alike. Consequently, the initiative had a slow start, public relations obstacles, and two institutional homes (with uneven oversight) before establishing itself in its intended base, Onion River Exchange. Although some of these issues may be unique to *Reach* and ORE, it is important for others to understand that Time Bank models may need flexibility, particularly if they are attempting to address significant community needs:

• Consistent with the original design of *Reach*, a Member Navigator is considered essential for assisting disabled and older adults in creating and accessing exchanges. Responsibilities of the Navigator (and/or members taking on navigational roles) include logging exchange hours for individuals without internet access or skills, proactively identifying potential exchanges, and referring members to existing services. Similarly, member screening is essential given the trust necessary within many exchanges.

• Volume is essential to a service exchange network. Volume requires efficient and multi-faceted outreach and strong linkages to a broad range of community organizations.

• The exchange of services without a monetary payment is a low cost service delivery model. However, an infrastructure is necessary to support the exchanges, and resources—including money—are required to support the infrastructure.

In conclusion, *Reach* offers an innovative model that supports aging in place by complementing the formal monetary and service delivery system. At the same time, it supports social integration by connecting members to one another, by connecting them to social and cultural organizations, and by
offering individuals opportunities to share their knowledge, skills, and talents within their community.

REFERENCES


