



 **JP HOME**  
AGING WELL TOGETHER  
ANNUAL REPORT 2015



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# MESSAGE TO MEMBERS

## Dear Friends,

As we reflect on the pilot year of JP@Home, there is so much to celebrate. Members have joined in creating a wide menu of educational, social and fitness activities. Committees have created plans, chosen leaders, invited others in and delivered, month after month with such skill and enthusiasm. Ethos staff responds with marketing, member services and organizational structure.

For the last month, we have been asking ourselves this question: So what have we really done by creating JP@Home? Here are some of our thoughts. We'd love to hear yours too.

We have built a network, a community, of almost 100 wonderful people who have chosen to age consciously, build new structures to support healthy, engaged aging and experience being part of a wonderful program, with many new friends.

We have developed a strong partnership with Ethos and now have four part-time staff devoted to member services; in-home assessments and case management; recruitment; and marketing.

We have created a channel for the desires, needs and expertise of our members. We are demonstrating the "longevity dividend" showing how much those of us in our 60's, 70's and 80's have to contribute to our community, to each other.

For us personally, we are so proud of what we have done together. We have worked our way through the challenges of launching a new program, so that we look ahead to 2016 with tremendous anticipation. And most importantly, we have new friends who have our back, are generous with their time and talents and who are a treasure in our lives.

**Elsa Bengel and Tottie Gelbspan**  
Co-chairs of the Advisory Council

# ABOUT AGING-IN-PLACE VILLAGES AND THE VILLAGE MODEL

**Villages** are a grassroots effort to address the current and unfolding challenges of an older America. Originally started in the Beacon Hill neighborhood of Boston, Massachusetts in 2002, the Village concept arose out of community members' desire to reside in their own homes while being able to access services that address their changing lifestyles as they aged. At its core, the Village Movement is consumer and customer-driven.



In 2000, Susan McWhinney-Morse and Nancy Myers Coolidge together with 10 other people age 60 and over created the non-profit Beacon Hill Village, a grassroots, self-governing, self-supporting consolidator of services. Created by elders, for elders, the Village has three simple components: It connects members to vetted, discounted providers and volunteers for any service they might want or need; It offers members healthy living: exercise classes, yoga, tai chi, informal lunches, and discounted homecare providers; And it organizes stimulating programs, seminars, and trips with the Village community to support connectedness and friendships.

## Core Principles of the Village Model

A mission to help people remain in their community and in their own homes by providing support and enhancing their quality of life.

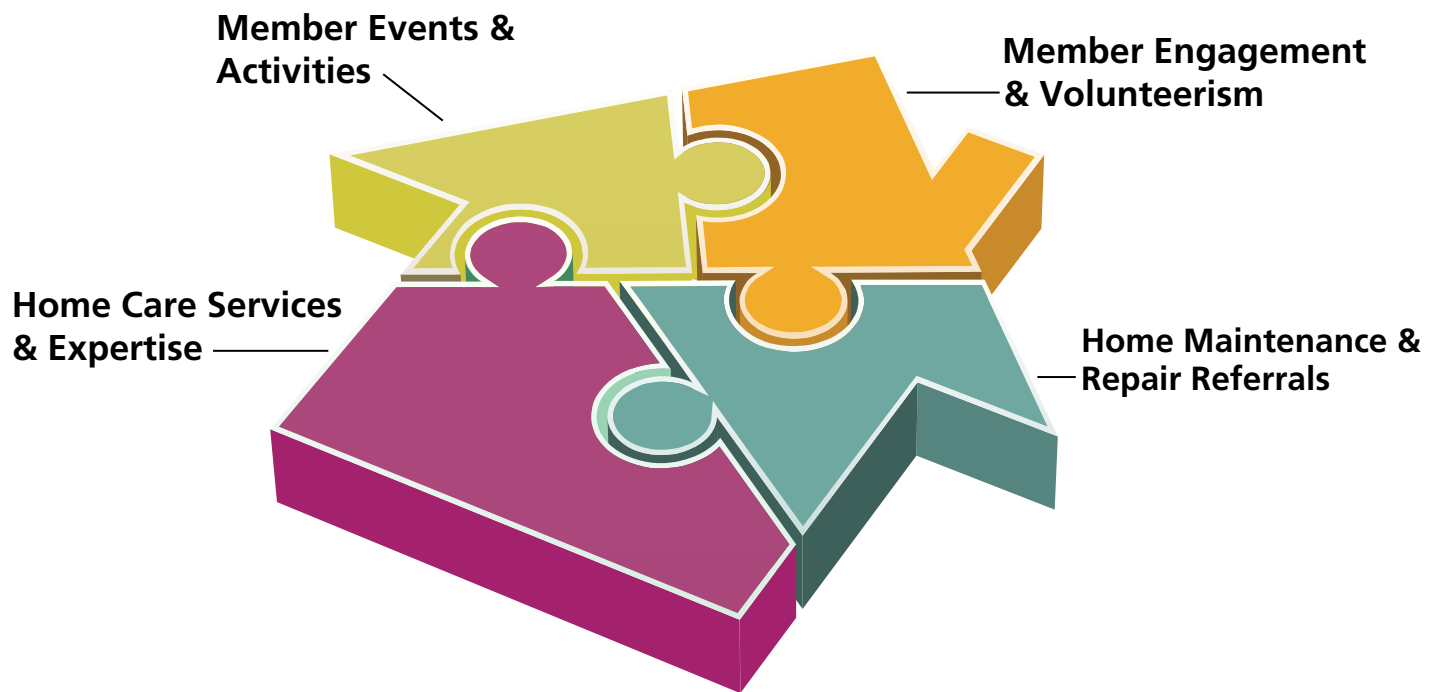
- ▶ **Consolidator of services** – “One call does it all” concierge service provider.
- ▶ **Strong consumer investment**
- ▶ **Self-supporting** through membership fees, fundraising and grants
- ▶ **Strategic partners** in the community
- ▶ **Focus** on the whole person
- ▶ **Volunteers** and Civic Engagement

## The Village Movement and Village to Village Network

JP@Home is one of 190 open Villages throughout the United States, with another 185 developing Villages that are members of the Village to Village Network. That translates to nearly 25,000 Village members. The Village to Village Network (VtVN) gives JP@Home direct access to all the villages and provides peer to peer support tackling issues regarding operations.

Village to Village Network, VtVN, began as a partnership from Beacon Hill Village and Capital Impact Partners, a Washington based non-profit that supports communities through taking innovative concepts nationally. It is now an independent association, supporting the development of new Villages, the sustainability of operating Villages, and advancing the Village Movement.

# JP@HOME STRUCTURE



**“My partner and I were thinking one day we would move to a continuing care retirement community. Then I read about JP@HOME starting. There was no doubt in my mind that this was what we need to carry out our plan: the support to stay in our home and a community of people with whom to learn how to grow older.”**

Penny Yunuba



**“I will sleep better at night knowing that JP@HOME assistance with daily activities at discounted rates will be there for me should I need them.”**

John Wicker

**“I wanted to be part of a network of enterprising folks that creates a web of supports and resources to keep us independent. And it’s been fun too!”**

TOTTIE GELBSPAN



# ABOUT ETHOS STAFF AND VOLUNTEERS

JP@Home is run and managed by highly qualified and motivated staff with support from an equally talented and committed

JP@Home Advisory Council (most of whom are founding members of JP@Home) and community volunteers.



## **Dale Mitchell**

Dale Mitchell is the Executive Director of Ethos and a long-time Jamaica Plain resident. Mr. Mitchell collaborates with JP@Home to ensure the overall strategic direction of the program is aligned with Ethos' mission and values.

## **Margery Gann**

Margery Gann is the Care Management Director at Ethos. Margery oversees all home care vendor relationships, provides leadership for the team on in-home needs and safety assessments and guiding the JP@Home Village Advisory on how best to meet members' care needs.

## **Ray Santos**

Ray Santos, Director of Community Relations and Development, has over 15 years of experience working on outreach and marketing campaigns throughout Boston and nationally, including many grassroots efforts, and has extensive experience reaching diverse populations. Ray provides overall leadership for Ethos on the program, including the development of all outreach strategy, marketing materials, media relations and management of JP@Home staff.

## **Meg Barhite**

Meg Barhite is the Director of Counseling and Support Services. In her role, Meg supervises the agency's volunteer base of 500 individuals, recruits, screens, and places volunteers for Ethos' portfolio of programs, including JP@Home, and manages all aspects of Ethos' core Volunteer Services.



### **Tanya Nixon-Silberg**

Tanya Nixon-Silber is the JP@Home Member Services Coordinator and is the main point of contact for members who require services and supports. Tanya comes to us with experience in community organizing and health, with positions at the Boston Public Health Commission and UMass Boston, and a special concentration on the importance of social support across the lifespan. She is the founder of a support group for mothers in Jamaica Plain and is a graduate of UMass Boston.

### **Tara Hatala**

Ms. Tara Hatala, is the JP@Home Village Advisor, a care coordinator and case manager for members. Ms. Hatala is a registered dietician and has over 20 years of nutrition related community education experience including with the Meals on Wheels Association, the Massachusetts Office of Elder Affairs and the Boston Mayor’s Office of Food Initiatives.

### **Kristin Slater-Huff**

Kristen Slater-Huff serves as our Member Recruitment Coordinator, funded by a special Boston Foundation Grant. Kristin has over 27 years of experience working with seniors. Kristin’s parents live in Jamaica Plain and are members of JP@Home.

# ADVISORY COUNCIL AND MEMBERS

## ADVISORY COUNCIL

The **JP@Home Advisory Council** has up to 15 individuals who are members and the group meets monthly. They provide advice, guidance, recommendations and feedback to the Ethos leadership who make up the remaining two members of the Advisory Council (Dale Mitchell, Ethos' Executive Director, and Ray Santos). The Advisory Council members generate and implement new educational, and serve as community advocates for JP@Home during outreach activities and events. JP@Home is fortunate to have a diverse group of individuals who bring a range of exceptional skills and talents.

## ADVISORY COUNCIL MEMBERS

### **Elsa Bengel**

Elsa is a proud founding member of JP@Home and currently serves as Co-Chair of the Advisory Council. In August 2012, she transitioned from her leadership position with the YMCA where she was Vice President/ Executive Director, YMCA Education and Training for 28 years. She founded YMCA Training, Inc. in 1984, and is proud of over 4,500 graduates who have launched new middle-skill careers. Elsa, her husband John, and their two daughters moved to Jamaica Plain in 1985. She holds a Master's degree in Human Services and is adjunct faculty for Springfield College School of Human Services, Boston Campus.



### **Anne "Tottie" Gelbspan**

Tottie Gelbspan is a founding member of JP@Home and currently serves as an Advisory Council Co-Chair. Tottie was a Senior Project Manager with the Women's Institute for Housing and Economic Development for 24 years until retiring 3 years ago. Among 14 projects she helped develop: GrandFamilies House -- first housing designed for grandparents with custody of grandchildren, Brookview House for homeless families (both in Dorchester) and Ingraham Place in New Bedford -- conversion of an historic school into housing for homeless families, afterschool and other non-profit program space.



## ADVISORY COUNCIL MEMBERS

### **Judy Goggin**

Judy Goggin has held national leadership positions in the fields of aging and lifelong learning. She served for twelve years as a vice president for Encore.org, an organization guiding a movement to tap the skills and experience of those in midlife and beyond to improve communities and the world. Judy led development of new initiatives including the Encore College and Next Chapter initiatives. She served for eighteen years at Elderhostel (now Road Scholar) as Vice President for U.S. Programs.



### **Rosemary Jones**

Rosemary Jones, MSW, retired from a social work case management position in the Boston Medical Center in 2009. She has continued her interest in advocacy by serving as the SNAP (food stamp) outreach for AARP Foundation's Drive to End Hunger and subsequently volunteering at the Mass Law Reform Institute. She speaks basic Haitian Kreyol and Spanish. A resident of Jamaica Plain since 1969, she has been active in a number of neighborhood citizen groups, and currently serves as on the executive committee of the board of directors of the Jamaica Pond Association.



### **Jim Kilgore**

Jim Kilgore was the Operations Coordinator at YMCA Training, Inc. in Boston, a computerized office skills training program, for 27 years. He did community development in a village in Kenya and a town in western Maine. He taught high school math in four US cities and two in Australia. Currently he enjoys time with two grandchildren, tennis, volunteering for JP@Home, and supporting efforts to bring about more democracy and a livable planet.



# ADVISORY COUNCIL AND MEMBERS

## ADVISORY COUNCIL MEMBERS

### **Judith Kilgore**

Judith Kilgore, now retired, was the Early Childhood Education Director for several programs in the Boston area including Horizons for Homeless Children, Children’s Hospital, and Lotus/IBM. She was the Founding Director for Buds and Blossoms, the only Mandarin language child care center in Boston. Before working in Early Education, Judy was a community developer in programs in the Philippines, the central California valley and rural Maine. Judy has a Masters degree in Leadership in Educational Settings. Her current passions are her grandchildren, quilting and JP@Home.



### **Renee Miller**

Ten years ago Renee and her husband moved from Brookline to Cabot Estates on Jamaica Pond, and have been enjoying Jamaica Plain life. She is a member of JP’s Footlight Club and has appeared in several productions there. She has been a volunteer driver for ITNGreater Boston which provides “dignified transportation for seniors”. An Advisory Council member of JP@Home she is a member of the One Time Program and Events Committee. She organized an An Old Time Sing-Along for JP’s Porchfest, an event we hope will continue to attract new members to our growing JP@Home.



### **Amy Pett**

Amy Pett was the editor of a suburban New York weekly newspaper for 17 years and later edited a national progressive feminist paper in Boston. In her early 50s, she earned a Ph.D. in sociology. She has also worked as the executive director of a small nonprofit, and was a community organizer for an environmental/public health project and then for the 2006 Massachusetts health care reform initiative that served as a model for Obamacare. Now retired, she is an artist.



## ADVISORY COUNCIL MEMBERS

### **Esther Schleifer**

Esther Schleifer is a retired clinical social worker and a graduate of the Smith College School for Social work. Most of Esther's career included working in multidisciplinary inpatient units for children in Boston area Hospitals. Her career included both clinical and administrative responsibilities. Esther now enjoys having a chance to begin a new project which will include the opportunity to participate in a range of activities and be of help to others.



### **Amy Stoffelmayr**

Amy Stoffelmayr, ACSW, PhD (Psychology) provided Psychological and Administrative services to individuals, families and groups in a variety of community and academic settings. Amy's particular interest is in Adjustment and Resilience, whether to social and psychological factors, health issues or developmental challenges, e.g. old age.



### **John Wicker**

John Wicker is retired after a career in international business. His expertise was in logistics and most particularly US export regulations. In addition to his work with JP@Home he is a volunteer with Ethos, Money Management Program and serves on the board of Spontaneous Celebrations. He has previously been active in committees at his children's schools and served as president of the board of JP Centre/South Main Streets.



### **Penny Yunuba**

Penny Yunuba retired early and has spent some of her time helping her neighborhood protect a plot on her street for a garden, volunteering at Little Brothers of the Elderly, and serving on a Quaker Committee on Aging. She is now setting up some Line Dancing classes in the local Boston Families and Community Center and coming up with too many ideas about what JP@Home might do next.



# FIRST YEAR ACCOMPLISHMENTS

## START UP & ADVISORY COUNCIL

After a year of organizational development and member recruitment, Ethos Board approved the launch of JP@Home in November 2014.

Conducted monthly Advisory Council and committee meetings to continue the growth of JP@Home and lead in the development of events and activities for members.

Throughout the year, Ethos staff and the Co-chairs of Advisory Council collaborated closely, through weekly meetings and conference calls, to coordinate services, activities and events for JP@Home members.

In October of 2015, Ethos' Executive Director Dale Mitchell and Advisory Council Member Judy Goggin traveled to Seattle, Washington for the National Village to Village conference, the annual gathering of organizations like Beacon Hill Village and JP@Home.

Organized and conducted the first Annual Meeting of members in January 2015. Formally elected and launched the Advisory Council as well as, formed committees to develop programs and events for members.





## MEMBER EVENTS AND ACTIVITIES

Held the first event in December 2014, a discussion group on Fears, Benefits and Changes in Self-Image as we Age.

Created two discussion groups focused on Aging & Spirituality for members to share their feelings and experiences.

In April 2015, we held a reception, bringing together Ethos staff, JP@Home members, community groups and elected officials, to formally celebrate the launch of the program.

Many members were impacted by reading “Being Mortal” by Dr. Atul Gawande, and went on to form four discussion groups on the book and the issues around aging it raises.

One of the most successful events held in our inaugural year was a presentation by Judy Schwarz, a nationally recognized expert in advocacy for terminally ill patients and their families. Ms. Schwartz discussed the importance of end of life planning issues such as medical directives, living wills and health care proxies, as well as, how to begin to talk about these issues with loved ones.

In July, members hosted a J.P. Porchfest sing-a-long to share our passion for the program with the community.

In the summer and fall, members took advantage of two Tai Chi: Movement for Better Balance classes, which help reduce the risk of falls among older adults.

Formed two Dining Out groups, including one for members who are hearing impaired, which meet monthly at neighborhood restaurants, to socialize, meet new friends and taste the wonderful food Jamaica Plain has to offer.

Hosted a JP@Home table at JP Open Studios with 3 member artists selling their work.

Organized a Soup Group, which holds regular pot luck dinners in members’ homes.

# FIRST YEAR ACCOMPLISHMENTS

## OUTREACH & COMMUNICATION, MEMBER SERVICES

Before the official launch of services, a complete program identity campaign was initiated which produced logos, letterhead, brochures, presentation templates, member buttons and lawn signs to reinforce the commitment Ethos and members have made to the long-term success of the JP@Home program.

Developed and launched a monthly newsletter to inform members about activities and events.

Throughout the year, staff provided 15 comprehensive In-Home Needs Assessments and 14 Home Safety Inspections.

Ethos staff completed 107 member requests for services or referrals, including securing snow removal and roofing contractors for many members during an historic winter that saw a record 108.6 inches of snowfall in Boston.

Secured three positive articles in the *Jamaica Plain Gazette* to share the news about JP@Home with the community.

Distributed materials, like File of Life forms, to help prepare members for medical emergencies.

Ethos secured a \$30,000 grant from The Boston Foundation to help fund a year-long member recruitment campaign that includes additional staff support and multimedia tools to engage potential members.

Launched an online portal for members to communicate with each other, post resources, make announcements and share Advisory Council information such as committee meeting minutes.

We are most proud of the amount of engagement and volunteerism our members have given. While the Advisory Council and committee members worked tirelessly throughout the year, members also hosted nine house parties and volunteered to make calls to less active members to learn how we might engage them more.

**“I don’t need support with daily activities at the moment. But I have experience with recovery from falls and surgeries in the past when these kinds of services were needed. My dear husband can’t do it all!”**

JUDITH KILGORE

**“I love JP’s diversity and mix of generations. That why I want to stay engaged here and contributing to this great community. I’m convinced that JP@HOME will help me do that and more. Count me in.”**

JUDY GOGGIN



# JP@HOME BY THE NUMBERS

Current Members of JP@Home



Members Recruited



Service Requests



Service Requests Completed



Home Needs Assessments



Home Safety Assessments



JP@Home Events





**“I don’t want my family and friends to worry about me. The innovative idea of getting information and learning about resources through JP@HOME gives me peace of mind.”**

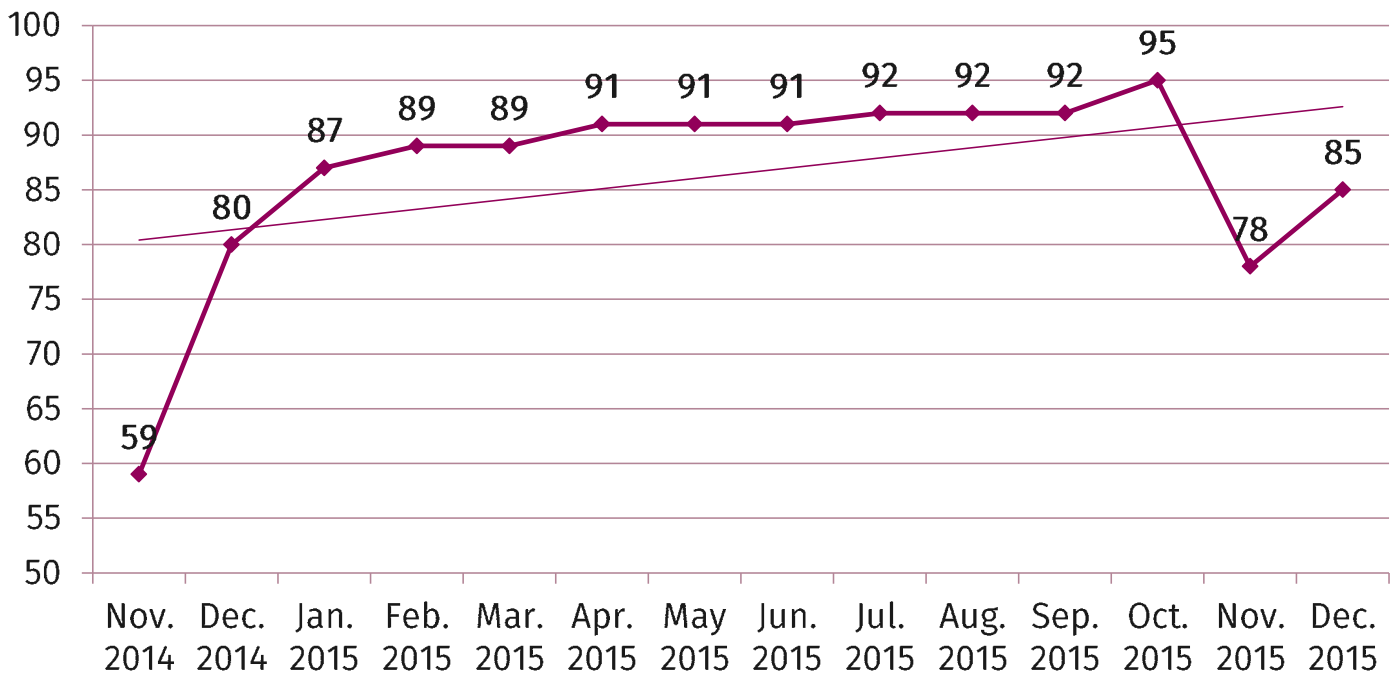
**SANDEE STOREY**

**“As the child of older parents and having worked in health care, I’ve never doubted that I may need assistance as I age. I think of JP@HOME as something that can help me maintain my autonomy, in a healthy way, even as I may need to depend on others.”**

**AMY STOFFELMAYR**

# MEMBERSHIP AND RECRUITMENT

## TOTAL NUMBER OF JP@HOME MEMBERS BY MONTH



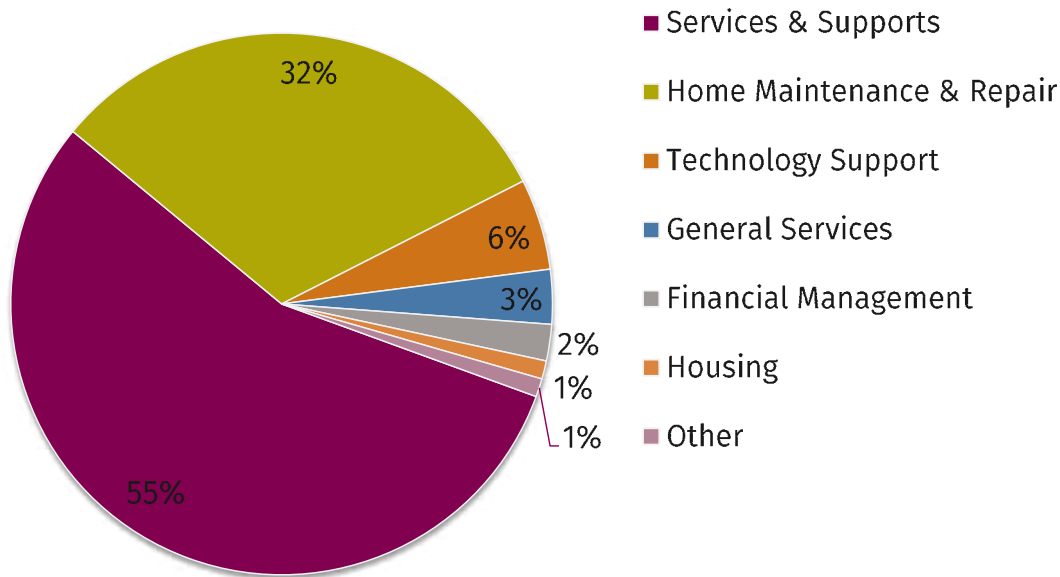
## RECRUITMENT EFFORTS THROUGHOUT 2016

As we launch into our second full year, we can recruit members based on what JP@Home is already doing (such as our classes, activities, groups and one-time events), as well as what we plan to do. We now have a recruitment coordinator on staff working with the experienced and enthusiastic Membership, Marketing and Outreach Committee. We are creating a Marketing Plan for the entire year and beyond.

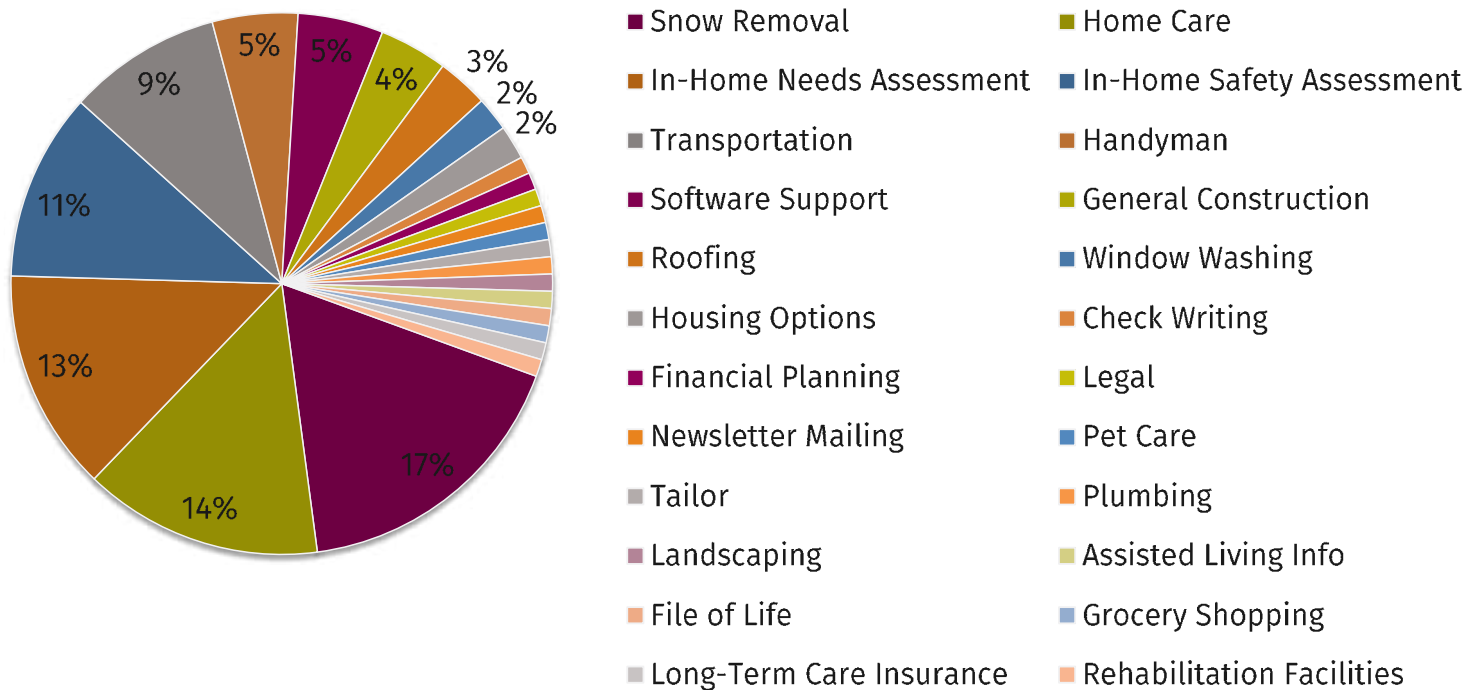
In 2016, we will take our lists of accomplishments on the road; to neighborhood associations, places of worship, senior fitness classes, health clinic in-service meetings, house parties, and business and professional meetings. We will set up information tables at farmers markets, coffee shops, public spaces and community events. We will generate stories about our members and activities for local publications. We are getting JP@Home brochures, banners, flyers, badges, members and staff front and center in the community's sight lines.

We recognize that, the more members we have, the more comprehensive, varied and powerful JP@Home will be. So we will continue to bring in new members and hope that you will help us by inviting your friends and neighbors to join us. We have plenty of professional, colorful recruitment materials we would be happy to share with you, our membership.

# SERVICE REQUESTS BY CATEGORY



# SERVICE REQUESTS BY DETAIL



# FINANCIALS

The JP@Home program is funded by membership fees, donations and in-kind contributions from Ethos. Additional restricted, one-year funding for recruitment and marketing efforts is provided by the Boston Foundation.

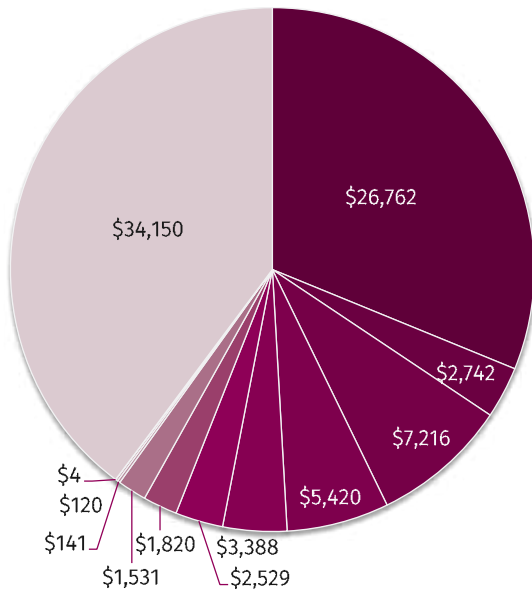
## BUDGET

CATEGORY	COST
<b>MEMBERSHIP FEE FUNDED</b>	
Salary & Wages - Member Services Coordinator	\$26,762
Taxes, Unemployment Tax, Workers Comp. Insurance - Member Services Coordinator	\$2,742
Fringe Benefits, Health, Dental, Disability Insurance - Member Services Coordinator	\$1,531
Rent, Utilities, Internet	\$3,388
Marketing, Communication, Advertising & Outreach	\$5,420
Legal, Consultants	\$2,529
Equipment, Computers	\$141
Program Services & Research Tools	\$120
Staff Travel	\$4
<b>SUBTOTAL</b>	<b>\$42,633</b>
<b>ETHOS FUNDED</b>	
General Admin & Overhead - Member Services Coordinator	\$7,216
Meetings, Conferences, Events	\$1,820
Executive Director	\$1,968
Care Management Director	\$2,706
Director of Community Relations & Development	\$27,716
Director of Counseling & Supportive Services	\$1,408
Village Advisor	\$352
<b>SUBTOTAL</b>	<b>\$43,186</b>
<b>BOSTON FOUNDATION GRANT FUNDED</b>	
Salary & Wages - Recruitment Coordinator	\$16,016
Taxes, Unemployment Tax, Workers Comp. Insurance - Recruitment Coordinator	\$1,015
Fringe Benefits, Health, Dental, Disability Insurance - Recruitment Coordinator	\$1,385
General Admin & Overhead - Recruitment Coordinator	\$1,163
Marketing Video Production	\$8,321
Brochure, Flyer, Poster and Presentation Design	\$1,250
Collateral Printing	\$600
Travel	\$150
Office Supplies	\$100
<b>SUBTOTAL</b>	<b>\$30,000</b>
<b>PROGRAM TOTAL</b>	<b>\$115,819</b>

\*Budget reflects the time period starting on October 1, 2014 and ending on September 30, 2015

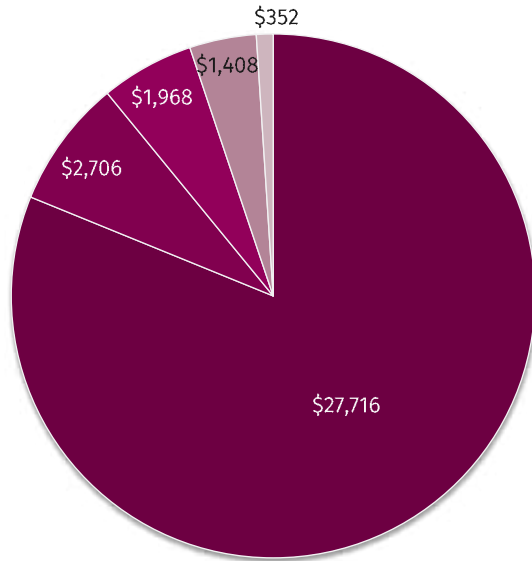


## ANNUAL BUDGET WITHOUT GRANTS



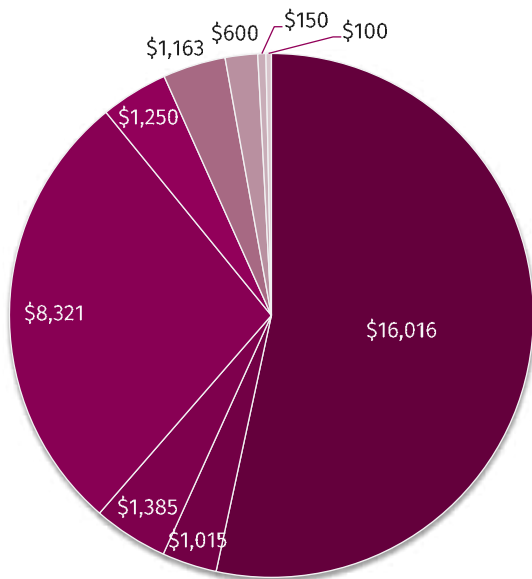
- Salary & Wages - Member Services Coordinator
- Taxes, Unemployment Tax, Workers Comp. Insurance
- General Admin & Overhead
- Marketing, Communication, Advertising & Outreach
- Rent, Utilities, Internet
- Legal, Consultants
- Meetings, Conferences, Events
- Fringe Benefits, Health, Dental, Disability Insurance
- Equipment, Computers
- Program Services & Research Tools
- Staff Travel
- Ethos In-Kind Support

## ETHOS IN-KIND SUPPORT



- Director of Community Relations & Development
- Care Management Director
- Executive Director
- Director of Counseling & Supportive Services
- Village Advisor

## BOSTON FOUNDATION FUNDED ACTIVITIES



- Recruitment Coordinator
- Payroll Taxes
- Fringe Benefits
- Marketing Video Production
- Brochure, Flyer, Poster and Presentation Design
- Indirect and Admin. Costs 10% from pers. Costs
- Collateral Printing
- Travel
- Office Supplies



**“I have created a number of ventures to help others. This time I get to create the organization I need! And I believe that the JP@HOME/Ethos partnership will become a demonstration with national potential.”**

Elsa Bengel

**“Organizing JP@HOME and meeting other seniors who believe in strengthening community resources for all of us has been a delight. I can’t wait to see what kind of projects we come up with!”**

Rosemary Jones

# ACKNOWLEDGEMENTS

**EDITOR:** Ray Santos

**DESIGNER:** Dickinson Labs & Ethos

Thank you to all of the JP@Home members that contributed photos and anecdotes throughout the year.

Thank you to Tanya Nixon-Silberg for her dedication and passion to member service throughout the year.

Thanks to Kristin Slater-Huff for her keen eye and editing.

A special thanks goes to Dale Mitchell, Elsa Bengel and Tottie Gelbspan for their thorough and thoughtful contributions to this report and for their leadership throughout JP@Home's first year.

Thank you to the Boston Foundation for their generous support of the JP@Home program and older adults throughout the Boston area.





Ethos  
555 Amory Street  
Jamaica Plain, MA 02130  
T 617.522.6700 | F 617.524.2899  
[www.ethocare.org](http://www.ethocare.org)