

Bannockburn Neighbors Assisting Neighbors (NAN) Annual Report 2014

Governance/Meetings: Bannockburn Neighbors Assisting Neighbors has completed its 7th year. The Board had 4 meetings during 2014, including an Annual Meeting of the Board in January. Miriam Kelty and Jillaine Smith continued their terms, 2012-2014. Doris Brody and Steve Baldwin's second terms end in December 2015. Lynn Springer, JoAnn Krecke's and Diego Hernandez's terms end in December 2015. Helene Granof and Richard Boltuck were elected to the Board with term ending in 2017. Miriam Kelty (President), Steve Baldwin (Vice President/Treasurer), and Doris Brody (Secretary) were elected by acclamation for two-year terms.

The Board discussed and adopted a conflict-of-interest policy recommended by our legal advisor and signed a statement of compliance with the policy. The policy must be reviewed annually and members of the Board must sign that they agree to comply with it. Ms. Jennifer Hough, a lawyer with Skadden, Arps, Slate, Meagher and Flom, acting pro bono, worked with NAN on its conflict-of-interest policy.

The Board was notified in summer 2013 that NAN had lost its 501©(3) non-profit status due to incorrect filing. Fortunately, the law firm that helped us prepare and file for our non-profit status originally graciously agreed to do it again. An issue that came up in relation to our IRS status as a non-profit charitable organization was documentation that NAN is supported by the community it serves. Since NAN is a non-member, no dues, all volunteer organization, it did not seek grants, donations or other financial support. The IRS defines community support as contributions and/or grants. Our legal advisor and the President consulted with two tax experts on how to respond to questions about budget, donations and grants in the application for 501 ©(3) status. (This was not an issue at the time of initial filing because, as a new organization, we were not expected to demonstrate funding awarded or obtained). While the application was pending, the IRS changed its policy to allow reinstatement. In 2014 NAN's non-profit status was reinstated retroactive to the date of revocation. Needless to say, the Board is most appreciative of the help provided by Ms Hough and her firm, and relieved that our status is reinstated.

Major business at Board meetings included recruiting Board members and Block Coordinators and discussion of how best to support neighbors who need assistance. Other topics of discussion included NAN programs, how best to communicate resources available from NAN and from other organizations, including Montgomery County, the increased level of needs of our oldest residents, training volunteers and the rapid growth of Villages and similar organizations for aging in place in the community.

After discussion and deliberation, the Board voted to participate in the pilot Village Rides program as one of 5 villages in Montgomery County invited to join. The program focuses on scheduling rides for volunteer riders and drivers, is being administered by

the Jewish Council on the Aging and The Senior Connection and is being funded by a federal grant. In voting to participate, the Board accepted its requirement relating to driver record, insurance confirmation and background checks on volunteer drivers.

An instruction sheet about the required filing for the State of Maryland and for the Federal IRS filing will be prepared by the Treasurer so that future treasurers will know what is required for Maryland and federal filing

Block Coordinator Recruitment and Meetings: Some Block Coordinators have moved and others resigned. Seven new Block Coordinators were recruited by JoAnn Krecke, Christo Andonyadis of Kenhowe Drive; Anne Quinlan of Pyle Road; Lily Hale and Kathleen Dameo of Vorlich Lane; Ali Davoodi and Nahid Akhyani of Elgin Lane and Beth Kellar who will assist Sally Richardson on Braeburn Place. Ellen Paul volunteered to be a Block Coordinator-at-Large. She is a back-up when somebody is away and will provide help when needed. Block Coordinators met for training and for a brunch hosted by Nahid Akhyani and her husband, NAN BCs. It was an opportunity for continuing and new BCs to get to know one another and for the Board to thank BCs for their work. More than twenty attended.

Volunteer Training: Training during 2014 included:

1. A training session for volunteers led by Monique Milholin of Chevy Chase at Home. The focus was on what makes a volunteer successful. Volunteers participated in several scenarios.
2. A training session for BCs led by Miriam Kelty that focused on ethical issues that volunteers may encounter when assisting neighbors
3. A training session for BCs, volunteers and community members led by Sarah King and Tori Goldhammer in which older residents and volunteers participated demonstrated how to use and to assist users of canes, walkers and wheelchairs
4. Volunteer Training Guidelines were developed by JoAnn Krecke and Miriam Kelty and were distributed to BCs who were asked to share them with volunteers on their blocks.
5. Drivers were offered training by Yonnette Williams of the Jewish Council on the Aging in use of Village Rides scheduling software and in the requirements of the Village Rides program

Direct Services: A priority for NAN is to assist Bannockburn seniors who wish to age in place. Areas in which help is needed were identified on the initial and subsequent surveys. Bannockburn and virtually all the villages that have conducted surveys identify transportation, social-educational activities and social visiting as their top priorities. Assistance with household chores is next with equipment loans and help with organization, finances, computers and other specific tasks following.

Since requests for assistance often are made directly to neighbors, to Block Coordinators and through the list-serv, tracking the number of services performed

continues to be difficult. Transportation is the most requested service. Most requests have been met, including rides to medical and other appointments, as well as rides to stores, classes and/or meetings on a regular schedule. Several households that needed help related to medical situations contacted NAN Board members and BCs directly. Assistance was provided for transportation, equipment, food and/or information about geriatric case managers and professional home-care companies.

Assistance with household chores includes a variety of activities: changing a light bulb, fixing a faucet washer, resetting circuit breakers, etc.; being present when commercial help comes to the home to deter taking advantage or over-charging or inappropriate behavior; advice on whether professional help is needed or whether a neighbor or family member can do the job that needs to be done.

A major service was a fire and safety inspection. Three teams, each with 3 firepersons and a BC or NAN Board member, targeted homes of seniors and people with disabilities. Smoke detectors were checked to see if they meet current standards. Those in inappropriate locations were reinstalled. The teams inspected 42 homes in 8 hours, spending about 30 minutes in each home. They installed 68 smoke alarms and replaced 20 batteries. Of the 68 smoke alarms, 50 were supplied by the Montgomery County Fire and Rescue Squad and 18 were purchased by or in some cases donated by the homeowners. On a second day, an additional dozen smoke alarms were provided, installed and batteries were replaced as needed. Ten-year alarms with sealed in ten-year batteries were installed in households in which changing a battery would be a challenge. In addition, our neighbors were instructed on what to do in case of malfunctioning smoke alarms and what to do in case of fire. For those that had no evacuation plan, one was developed. Files of Life, a magnetic packet to go on the fridge, were distributed to all households. Residents were told that if the form is filled out, in the event of emergency, the rescue squad will get them to a hospital 5 minutes sooner when they have the information provided in the File of Life.

A variety of equipment has been loaned ranging from baby car seats, cribs and high chairs to canes, walker and crutches. Most of these transactions take place via the listserv.

NAN provides information and services to assist the community at large as well as individuals with specific needs. For example, NAN has distributed and posted a list of snow shovelers, a list of resources targeted at older residents, and information on emergency preparedness. Information relevant to seniors, including upcoming events, is distributed via the listserv.

NAN continues to receive requests to assist some the oldest residents in our community. About half the requests came from neighbors of these residents who were concerned about their welfare and contacted NAN. Others came from adult children who are nearby or out of town. The needs ranged from transportation to a series of

medical appointments, to identifying professional services providers, to information about County services, to visiting, shopping, reading, and reassurance. Although most of these requests were filled easily, some situations observed in the home raise questions about safety and ability to manage independently. Similar situations have been observed by other Villages that have been operating for several years as their residents become older and need more help.

Social visiting and activities that foster socialization are appreciated by Bannockburn seniors. BCs and other neighbors visited some seniors on a regular basis. In other situations, visits were in response to specific needs. Monthly programs and socials provided an opportunity for seniors to interact with neighbors of all ages. Visits to neighbors who employ full-time or part-time caregivers or in which a family member is a caregiver raised awareness of caregiver social isolation and stress.

Social/Educational Programs: NAN sponsored a variety of programs/social activities of broad interest and some geared more to interests of older persons and/or their adult children. Some programs were co-sponsored with other community organizations. 2014 programs included:

January:	Sing Along; Newcomers' dinner
February:	Pete Seeger Sing Along; Social Hour
March:	Robust Walking
April:	Survivors of Genocide in Rwanda
May:	Spring Show (with first night NAN focus)
June:	Low Vision: Ways to Enhance Your World; Water Aerobics
July:	Water Exercise
September:	Ice Cream Social; Falls Awareness: Home and Health
October:	Mobility Challenges; Music Festival
November:	Crafts Fair
December:	Holiday Activities

Book Clubs – In 2011 NAN sponsored a community meeting at which 4 book clubs were organized. Three meet monthly or every 6 weeks.

Wise Elders: The Wise Elder Program did not take place in 2014 because nobody volunteered to take the lead in coordinating with the school and recruiting and training seniors and students. The Board will continue to discuss revitalization of this program.

Communications and Outreach: Block Coordinators recommended that communication and outreach activities are needed to inform Bannockburn neighbors about NAN, its mission and services. A printable copy of the NAN brochure is posted on the NAN page of the Bannockburn Community website.

NAN distributed periodic notices of upcoming events including county activities, programs of other villages, cultural event and service events. These have been well-received and some residents report that they have attended some events.

Outreach activities centered on interaction with groups in Montgomery County and in the greater Washington area. NAN was invited to participate in county and other meetings about 'villages' and to share experiences with other groups that promote aging in place in the community. One outcome of NAN's participation in county educational/information sessions is that the county is continuing its membership in Village to Village Network and has given NAN access to webinars, list-serv and other resources. Issues raised at these meetings include: administrative management; data systems and support; planning for turnover and succession of leadership; negotiating preferred provider pricing for villages; keeping up to date on community resources; membership (fee based) or no membership; geographic boundaries; student service learning hours and the role of faith based organizations in villages. Similar issues have been discussed in the quarterly meetings of Washington Area Villages Exchange, a group that meets quarterly to share information and to support village development. NAN keeps in touch with close-by 'villages' such as Chevy Chase at Home, Burning Tree, Neighbors2Neighbors and Cabin John. NAN continued participating in Maryland villages statewide community of practice for villages. This year the Village Coordinator, a full-time Montgomery County employee, has facilitated interaction among villages. A Bethesda-Chevy Chase villages group meets quarterly to share information and to collaborate.

Fund-raising: In 2014, the Wagman family directed donations in memory of Betty Wagman to NAN. \$400 was received from this source. Just under \$100 was donated by community members at the Pete Seeger sing along. Montgomery County awarded NAN \$114 to support training activities and development of the Volunteer Guidelines.

Priorities for 2015: NAN's priorities for the coming year remain similar to last year's :

1. Provide services to Bannockburnians, particularly to assist seniors who want to age in place.
2. Invite neighbors to Board meetings to familiarize them with NAN and to see if they are willing to become more involved, perhaps as Board members and then officers.
3. Hold a community meeting to get feedback on NAN and to listen to community recommendations for services and programs. Explore interest in a walking group, caregiver support group, movie group, etc.
4. Recruit and retain block coordinators, make sure they are well informed about NAN purposes and services, and offer them training and opportunities to interact.

5. Increase social/educational programs and community participation in them.
6. Recruit volunteers to provide services and to help with programs.
7. Increase rider and driver participation in Village Rides program
8. Expand and update the NAN webpage.

Miriam Kelty, December 2014