

Capitol Hill Village 2017-2018

Town Hall Meeting
May 14 2017



www.capitolhillvillage.org

AGENDA

4:00: Capitol Hill Village – Year in Review

- Board overview – Phil Guire
- Financials – Angela Beckham
- Organization Activities – Molly Singer

4:40 Q/A

5:00 Breakouts

- CHV looking forward
- CHV Program and Activities
- CHV Board meet and greet

6:00 Adjourn



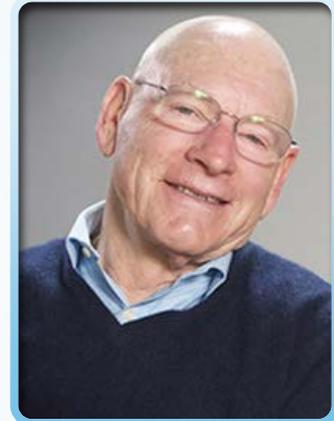
Where are We Today and Where are We Going?

1. Board Overview: Looking at the Past – Eyeing the Future
2. Year in Review – Finances and Endowment: Dollars and Sense
3. Working Today for the CHV of the Future: Looking Forward
4. Strategies: What is CHV Doing and Why?
5. CHV at 10 years: Looking at the Numbers
6. Capitol Hill Village 2014 – 2017 Strategic Plan: The Groundwork for the Future
7. Capitol Hill Village Members: All Corners of the Community Coming Together
8. Capitol Hill Village Programs: Keeping the Community Engaged and Connected
9. Capitol Hill Village Care Services: Inspiring Independence
10. Volunteerism: The Life Force of Capitol Hill Village
11. Capitol Hill Village Education and Wellness Programs: An Ounce of Prevention
12. Transportation, Advocacy, and Community Building



Board Overview

- Four new board members
- 2014-2017 Strategic Plan
- Internal Organization
 - Finance Committee
 - Governance Committee
- Onward Planning



Year in Review: Finances and Endowment: *Dollars and Sense*

REVENUES	FY2013	FY 2014	FY 2015	FY 2016	FY2017*
Membership Dues	\$133,000	\$156,000	\$178,000	\$180,000	\$189,000
Grants	\$0	\$4,000	\$3,000	\$141,000	\$373,000
Donations	\$130,000	\$133,000	\$201,000	\$122,000	\$238,000
Event revenue (net)	\$62,000	\$64,000	\$56,000	\$123,000	\$116,000
Other	\$26,000	\$17,000	\$49,000	\$9,000	\$18,000
TOTAL REVENUES	\$351,000	\$375,000	\$437,000	\$574,000	\$934,000
EXPENSES	\$305,000	\$329,000	\$453,000	\$547,000	\$772,000
Earnings (loss)	\$46,000	\$45,000	(\$16,000)	\$27,000	\$162,000

Unaudited Preliminary



Notes

- CHV's 2017 revenues grew 64% over 2016 levels to \$934k.
- 2018 revenues will stay about the same as 2017.
- Revenue growth since 2015 is primarily from donations and successful grant writing, including large government grants.
- Financial assets have grown to \$743k, primarily due to donations into the endowment.
- In 2018 CHV is spending about \$100k to develop a new computer system and website, and this has caused the decrease in bank balances in 2018.



CHV Financial Summary

- CHV 's budget has tripled over 5 years to about \$1 million as we meet the needs of a growing and aging membership.
- Our biggest expense is paying our staff, which has increased since 2013 from 2 full time and 1 part time to 8. We also spend meaningful amounts on rent, utilities, and services such as bookkeeping and computer help.
- Membership dues have always covered less than half of expenses. We have always relied on charitable giving to fill the gap. Since 2016 grants have been important in maintaining our sustainability.
- Expenses have been higher in 2018 because we are implementing a new IT system and web site.
- Throughout all these changes, our financial condition has remained sound. CHV maintains cash operating reserves and has never carried debt. Our endowment has tripled from \$182,176 at September 30, 2013 to \$614,014 today.

CHV Financial Performance

US\$ 000's	UNAUDITED		6 months to March 31st
REVENUES	FY 2016	FY2017	FY 2018
Membership Dues	\$180	\$189	\$189
Grants	\$141	\$373	\$129
Donations & Events	\$245	\$354	\$319
Other	\$9	\$18	\$0
TOTAL REVENUES	\$574	\$934	\$637
EXPENSES	\$547	\$772	\$591
Earnings	\$27	\$162	\$46

FYE 9/30	2016	2017	3/31/2018
Endowment	\$308,508	\$454,707	\$605,088
Bank Operating Accounts	<u>\$207,930</u>	<u>\$209,668</u>	<u>\$138,611</u>
TOTAL	\$516,438	\$664,375	\$743,699

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Organizational Sustainability

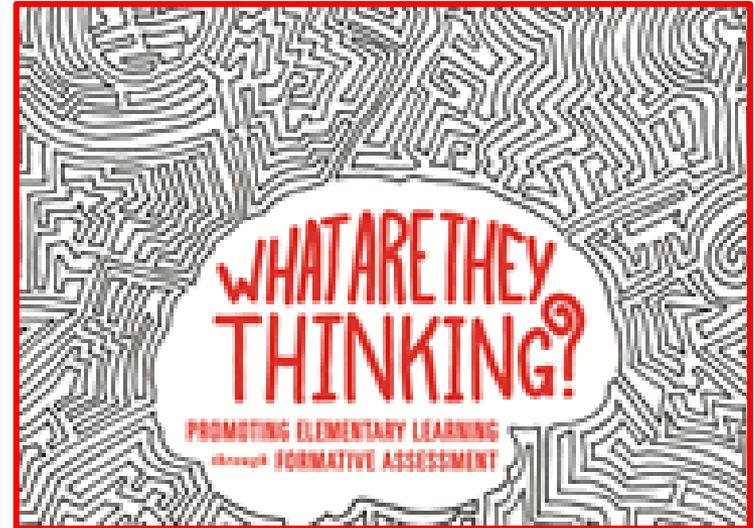
- Members are older and need more services
- Cost of serving members and “doing business “ increases
- How to balance volunteer supports with more complicated needs.
- Diversity in funding
- Growing foundational assets
- Exploring cost savings / revenue generating



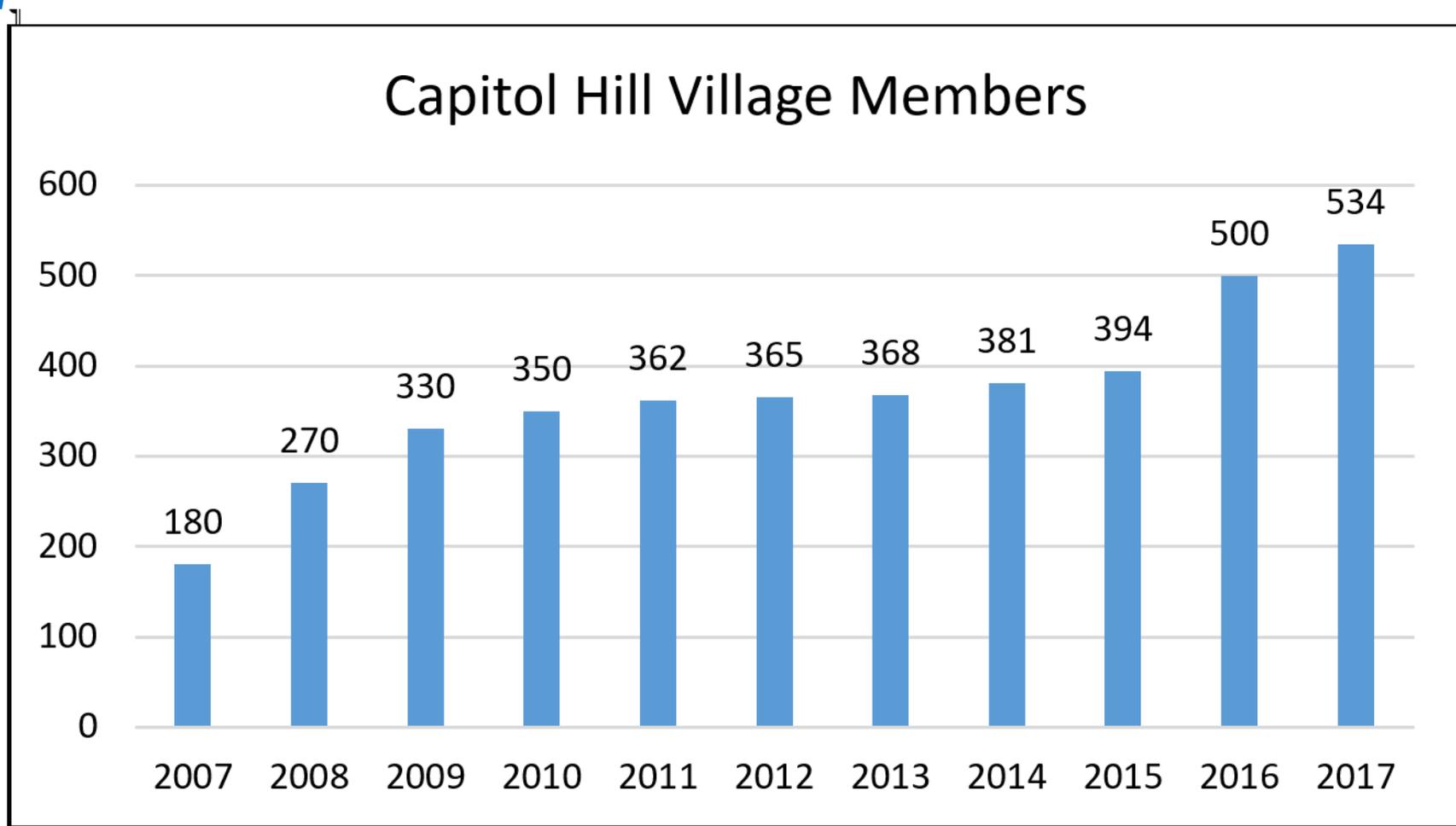
Strategies

What is CHV Doing and Why?

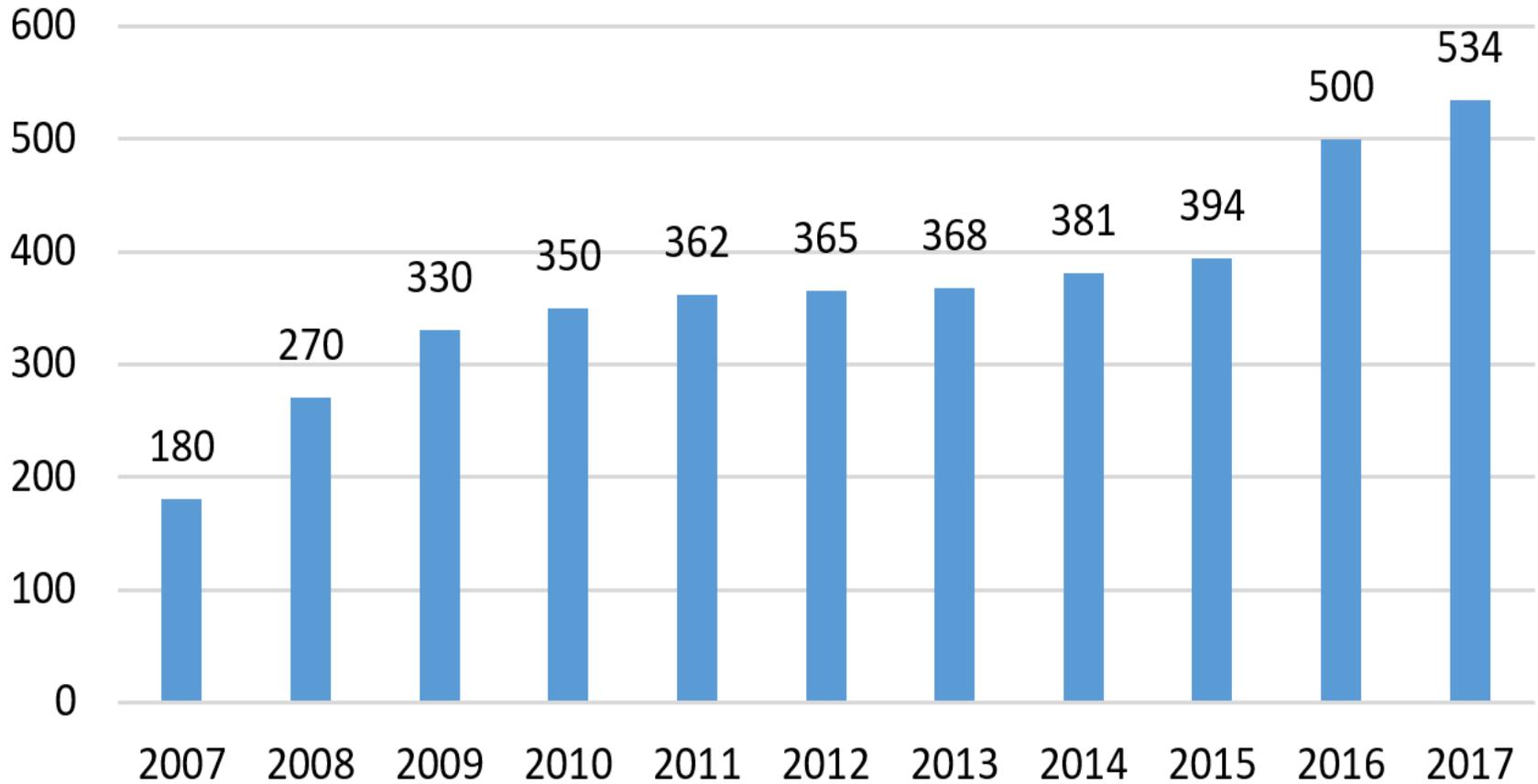
- Villages as a Health Model
- Local and National Model
- IT for Seniors
- Transportation
- Inclusive Community



CHV: *Looking at the Numbers*

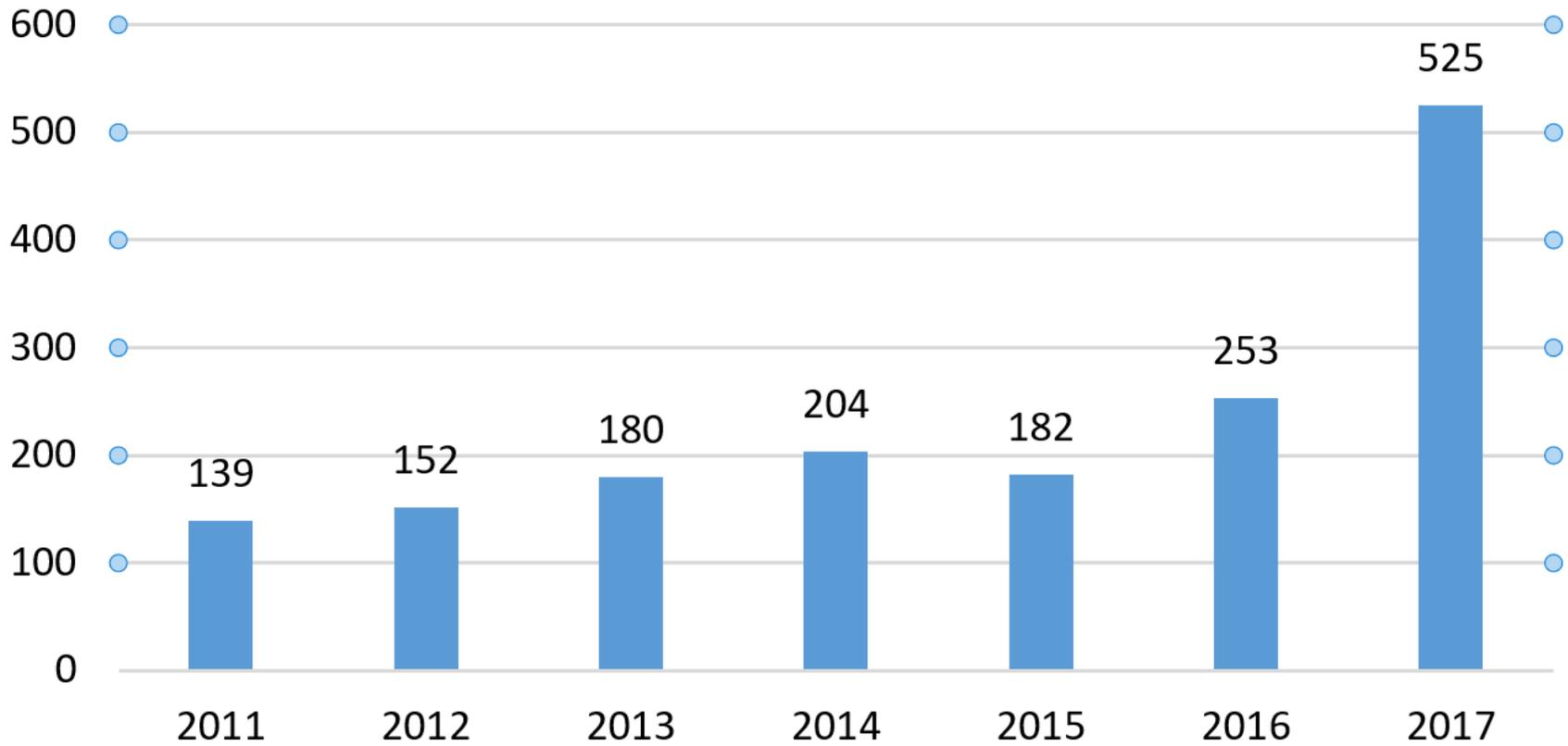


Capitol Hill Village Members



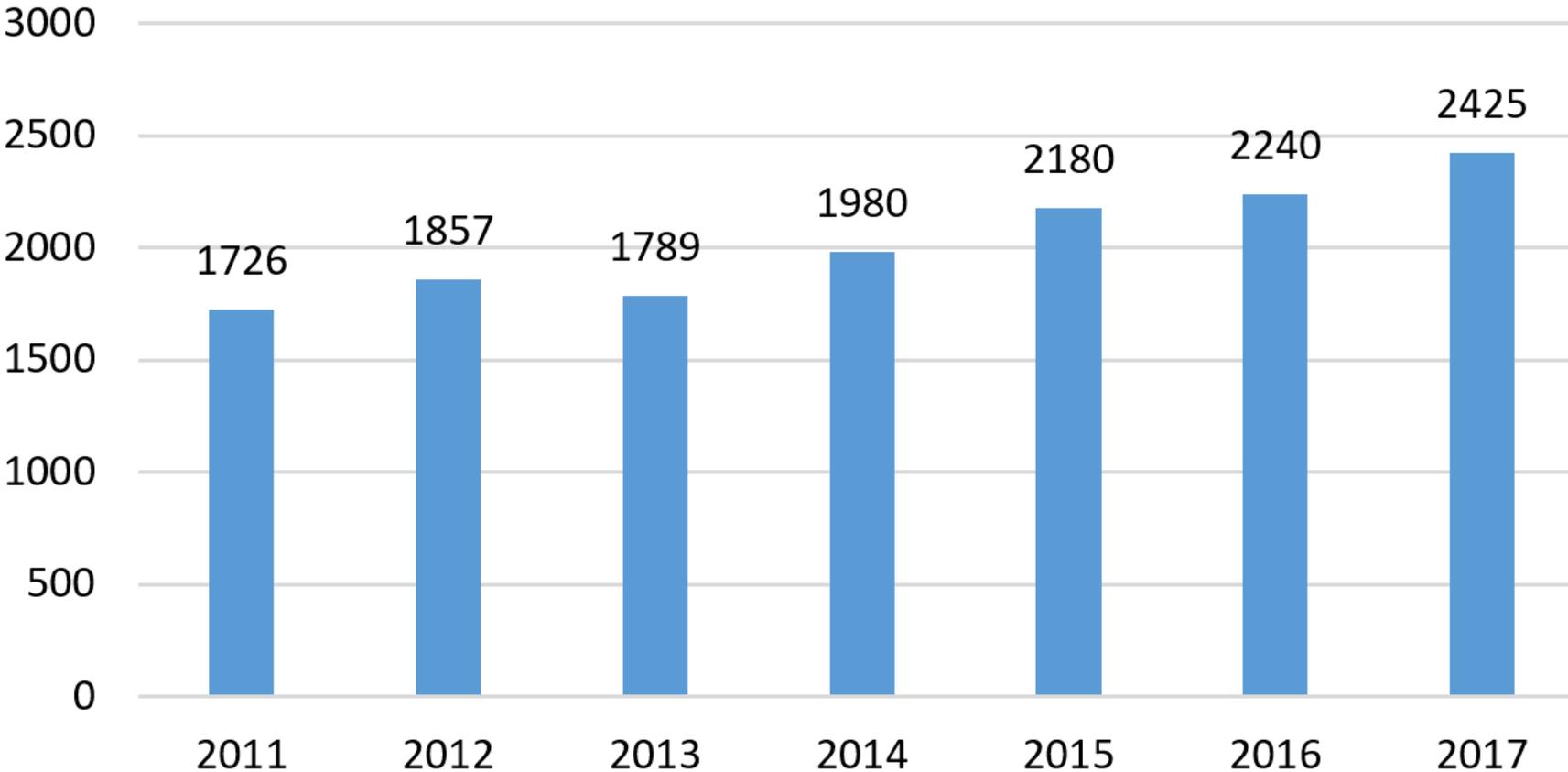
Capitol Hill Village Events

Total 2011-2017 = 1,635



Capitol Hill Village Services

Total 2011-2017 = 14,197



2014-2017 Strategic Plan

GOAL 1: Build Financial Stability	
OBJECTIVE	OUTCOME
Increase endowment revenue.	★ ACHIEVED: Endowment was \$250,000 in 2015 and is more than \$600,000 today.
Increase revenue from corporate sponsors and donors.	★ ACHIEVED: Through corporate grants and sponsorships, upwards of \$80,000 a year compared to \$45,000 in 2014.
Develop strategic policy for changes in dues structure.	★ ACHIEVED: New membership categories were created and a new dues structure put into place.
Increase revenue from grants to 10 %	★ ACHIEVED
Increase revenue from social memberships to 20 percent of membership revenue.	● NOT ACHIEVED: While membership has grown, social membership is about 9 percent of the whole.

2014-2017 Strategic Plan

GOAL 2: Diversify Membership to Reflect the Community of Capitol Hill	
OBJECTIVE	OUTCOME
Increase number of members who are of color to 15 percent.	● NOT ACHIEVED: Previously CHV did not collect data about race/ethnicity (it does now) so this number is difficult to define. We estimate membership among persons of color is around 10 percent of the total.
Increase visibility and community of LGBTQ community within the Village.	★ ACHIEVED: CHV hosted a LGBTQ Pride event and is conducting outreach and partnerships with LGBTQ efforts citywide. Also, a part of the programming for FY2018 will address those without children or immediate family.
Increase the diversity of socio- economic levels, particularly those in middle income thresholds.	? UNSURE: CHV does not gather socio-economic information except for subsidized members. CHV has increased subsidized memberships.

2014-2017 Strategic Plan

GOAL 3: Build Community Through Social Engagement and Through Helping Others	
OBJECTIVE	OUTCOME
Increase the number of members engaged in social activities to 80 percent.	? UNSURE: CHV was not able to calculate this using its current method of collecting data. Indicators are that a large percentage of members are engaged in social and educational activities because the number of activities has increased and signups for activities remain high.
Increase the number of members who are Village volunteers to 50 percent.	★ ACHIEVED
Enhance the volunteer experience in the Village community.	★ ACHIEVED: Throgh Village Connections and some focused training; in 2018 CHV will continue to focus on volunteers. The variety and ages of volunteers has also increased.
Increase opportunities for life-long learning.	★ ACHIEVED: Created ongoing learning affinity groups (e.g., Russian language, ukulele) as well as Symposia and committees.

2014-2017 Strategic Plan

GOAL 4: Deliver High Quality, Highly-Valued Services to Members Through Volunteers, Vendors, Staff and Public/Private Partnerships

OBJECTIVE	OUTCOME
Improve vendor services.' quality /breadth	★ ACHIEVED: CHV revamped and re-vetted our vendors. This will continue with CHV's new IT System.
Develop partnership with DCOA to increase use of services	★ ACHIEVED: CHV has formed a range of partnerships to expand services. These help CHV focus on its best programs and services while ensuring members receive highest quality care.
Increase impact and quality of the care-coordination program.	★ ACHIEVED: CHV is implementing stronger practices and documentation. It is creating stronger criteria for membership and care services. It is strengthening the Village Connections program.
Create a supportive and engaging environment that attracts and retrain highly-qualified staff.	★ ACHIEVED: CHV has strong individual staff members and a strong team, complemented by volunteers who are critical to carrying out services. Board and members are engaged in interviewing and bringing on new staff members.
Define and communicate services with members and community.	★ ACHIEVED: CHV has increased communication methods, including improved newsletter formatting and increased emails, fliers, and promotions across programs, posting in coffee shops, community lists, on websites, in the Hill Rag, etc

2014-2017 Strategic Plan

GOAL 5: Become a Recognized Leader for Effective Aging in Place	
OBJECTIVE	OUTCOME
Use the Age Friendly Cities framework to improve life-long aging.	★ ACHIEVED
Establish Capitol Hill Village as the local community expert on aging-in-place.	★ ACHIEVED: CHV is collaborating with other Villages on a number of projects to both share approaches and strengthen the position of Villages across D.C. It is also working to foster collaboration among Villages and senior service groups. CHV has hosted a number of co-learning events around transportation and IT.
Advocate within the national Village- to-Village Network on increasing the role and function of Villages as leaders in aging-in place.	★ ACHIEVED: CHV hosts monthly webinars, other occasional webinars, and peer-to-peer training. CHV also presents at conferences and contributes to the Village-to-Village Network when called upon. CHV is also partnering with other national researchers and aging experts including the University of California at Berkeley and the Rand Corporation.

Capitol Hill Village Members: *All Corners of the Community Coming Together*

534 community members:

144 households represented 1 person;
244 households had two or more people;
51 social members, and
72 members who pay reduced membership fees.

In 2017, CHV:

Welcomed 79 new members
Lost nine to death,
Saw 11 households moved away.

Average age of CHV members is 74.9 years.



CHV Programs: *Keeping the Community Engaged and Connected*

In 2017 CHV embraced the following activities:

- Wyze Guys
- Accessible Affinity Groups
- Inter-generational
- LGBTQ.

Thanks to the
fearless members
who launches
these ideas!



Capitol Hill Village Care Services: *Inspiring Independence*

Care Services are classified into three levels:

Level 1: *Resources and referrals on information, services, supports.*

Level 2: *For individuals who are frail or struggle with a persistent illness or other condition.*

Level 3: *Care Services for those who need intensive weekly support, counseling, and case management.*

CHV's Top Five Referred-to Resources

1. CHV Volunteer Services
2. Home Care/Private Aide Resources
3. Medical Transition Planning
4. Durable Medical Equipment
5. External Transportation Surces



2017 Care Services Statistics

Average monthly services: 82 persons received services/month

Average monthly engagements: Social workers interacted with Care Service members 192 times for an average of 45 minutes/month.

Level 1: Average • 36 / month	Level 2: Average 59 / month	Level 3: Average 93 / month
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Volunteerism:

The Life Force of Capitol Hill Village

- Volunteering is an expectation of our community
- CHV averages 75 volunteer requests a month, including rides, household tasks, IT help, and more
- There are about 56 people / month who are creating activities, conducting research, hosting events and more



Unusual Volunteer Requests

- A member needed a professional make up job and a head shot.. CHV suggested Aveda for the make-up, since they were having a special sale: cost \$10. And a Village volunteer with a photography background took her photo.
- One member, recovering from an illness, did not want to lose the fitness she'd gained from walking, but she did not feel comfortable walking alone. CHV paired her with a walking buddy!
- Someone called to have her cat's toenail's clipped!
- Anyone know an expert in gold-leafing to advise on a project – CHV does!
- CHV has a volunteer nurse who helps a member use her sequential compression device to ensure good blood flow.



New Volunteer Projects in 2017

Farmers' Market: In the Fall CHV held four farmers' markets in partnership with Community Foodworks, an organization that provides low-cost, local fresh produce. We are working to ensure that volunteers can run these farmers' markets and are recruiting volunteers to continue the markets in the Spring.

More Younger Volunteers: In 2017 Capitol Hill expanded its engagement of younger volunteers, working with more than 25 youths to help with technology programs, provide companionship to members, do office work, and general chores.

Paint Pick Up: In addition to hazardous household waste, CHV provides paint pick up and disposal.

More IT Assistance: You name the challenge, we have the solution



CHV Education & Wellness Programs: *An Ounce of Prevention . . .*

Wellness Programs: CHV has more than 100 wellness activities a year,

Health and Education Programs: Decoding Dementia, Atul Gwande, Hospital Warrior, Get Your Papers in Order, Five Wishes and Advanced Planning ... and more!!

IT Programs: 21 programs including group classes on specific topics, as well as small group all-comers events.

Village Voices: Community members share their expertise on current events and cultural affairs 10 times a year

A Greater Capitol Hill for Long Life Symposium:
Building a community for long life.



Transportation, Advocacy, Community Building: *A Greater Capitol Hill for Long Life*

Transportation:

DC is rich with transportation options.

Important to understand and exercise options including :

- Ensuring safe pedestrian options
- Public transportation, leveraging new taxi / uber options.
- Enrolling in programs that you are eligible for.
- Learning metro
- Safe driver classes

CHV is working with other DC Villages to create models, raise profile and realize the power in numbers.

If you learn new skills and practices today, you will persist in those practices longer. If you learn yoga or bus riding) you will more likely persist longer than if you wait to try something new.



Advocacy

Advocacy Committee – of the CHV Board –supported by CHV’s 49 member Advocacy Corps.

The Secret to Success: Research, meetings, public turn out

Researching best practices

Meeting with public and private sector leaders

Turning out for meetings

- Eastern Branch Boys & Girls Club into Senior Co-Housing
- 32 proposed amendments to the DC Comprehensive Plan,
- 17 Testimonies at DC Council oversight, budget, and hearings;
- 5 Council member –one-on-one meetings
- Dozens of letters of support and editorials on a range of public issues that impact seniors.



Building Partnerships Across the Community

Public & Private Partners

- 11th Street Bridge Project
- Events DC
- Barracks Row and Eastern Market Main Streets
- CHAMPS

- Maury Elementary School
- Blyth Templeton Academy
- Richard Wright Public Charter School
- Gallaudet University
- University of Maryland
- Trinity College
- DC Public Library

Education Partners





Next Up:

Break outs to learn more and share ideas.

Group A: BOARD – STAFF – STRATEGY

Group B: STAFF – STRATEGY – BOARD

Group C: STRATEGY – BOARD -- STAFF

