

**Woodstock Economic Development Commission
Application for Community Project Grant 2019**

Name of Project: Woodstock Homeshare	
Brief Description (50 words): Using the proven model developed by HomeShare Now, Woodstock HomeShare will implement a shared housing system that "matches" homeowners in the community with community members seeking housing. The matching process will emphasize mutual safety and compatibility of the homeowner and home sharer.	
Grant Request: \$7,689	Total Project Budget: \$15,377

Applicant Information

Name of Applicant/Organization/Business: Woodstock Area Council on Aging d/b/a The Thompson Senior Center	
Mailing Address: 99 Senior Lane, Woodstock, VT 05091	
Name of Project Coordinator: Deanna Jones, Executive Director for The Thompson	
Contact's Email Address: djones@thompsonscenter.org	Telephone: (802) 457-3277
https://www.thompsonscenter.org/ Organization's Website URL:	
EIN: 03-0295419	
Applicant/Organizational Description: Briefly describe your organization or group and its mission. (150 words) The Thompson's mission is to help seniors to age well in our rural community. We provide timely support and services, and are a resource and advocate on issues related to aging. Our programs and activities foster the physical, intellectual, and social well-being of our adult community to enhance dignity, self-worth, and independence. Services include a robust nutrition and meals program serving over 20,000 meals annually, a transportation program	

that coordinates and provides 5,000 rides annually, social events, health & wellness events, lifelong learning, and Aging at Home support and services including referrals to vetted service providers. The Thompson engages with many community partners to bring programs and resources to Woodstock and surrounding towns. Through thoughtful growth and development, we respond to the current needs of our community and by bringing supported Home Sharing to our area, we will help to meet a significant need in our community.

Applicant/Organizational Budget: What is your total organizational budget (or total project expenses) for the current fiscal year? \$594,471

Organizational Budget (Required for businesses and organizations): Attach a copy of your Budget to Actual comparison or Profit Loss (P/L) statement for the most recently completed fiscal year.

Project Information:

Project Goals: Explain the goal(s) of the project. Describe the work you will do and what that will accomplish, in other words - what you are doing and why. Please be specific. (300 words)

Woodstock Homeshare will address two key issues affecting the community: 1.) the lack of affordable housing and 2.) the large number of community residents living alone in houses that may be difficult for them to afford and maintain and / or who may desire some assistance or companionship in their home. Based on a model that has been successful nationally and in Vermont, Woodstock HomeShare will collaborate with Home Share Now of Barre, Vermont to create a program to match those with a home they would like to share and those who are looking for a shared housing situation. While the Woodstock Homeshare program will be open to adults of any age, historically home share programs of this nature have appealed to a somewhat older demographic and therefore the Thompson Center is well positioned to implement such a program.

Under the guidance of Home Share Now, The Woodstock Homeshare matching program will create and implement a clear set of procedures, including background checks, applicant interviews and reference checks, to ensure that homeowners and home sharers in the program are secure and compatible in their matching. In the HomeShare Now model, applicants to the program pay a sliding scale fee, ranging from \$60 - \$500 when a successful match is made. These fees would be waived during the initial start-up for the first matches made. The amount paid by the home sharer to the homeowner typically ranges from \$0 - \$500 monthly, with the option to prorate or eliminate rent in exchange for up to 12 hours weekly of home chores, driving, errands or similar tasks. Such tasks **cannot include any personal care services**.

Woodstock Homeshare will implement this program with the guidance of Home Share Now. Program planning will include delineation of responsibilities and fees between The

Thompson Center and Home Share Now. Woodstock Homeshare will consult with Town / Village officials as the program moves forward and will maintain a communications effort with the broader community about the goals and operations of the program. Potential liability issues have been discussed with The Thompson's insurance carrier and are not anticipated to present any barrier to proceeding with the project.

Project Timeline: Please explain the overall timeline for your project as well as the specific steps required to achieve your goals. Please list specific dates if they've been identified. (150 words)

The initial phase of the project will develop program structures and operational policies. The second phase of the project will include a pilot implementation of the program, with ongoing evaluation and adjustment as needed of operational procedures. The first Home Sharing match would be anticipated in August of 2019. The pilot period would end in May 2020. Please see attached project plan / budget for details.

Project Champion: Who is championing this project, what is their role in the community, and why are they leading this work? (100 words)

Deanna Jones, Executive Director of The Thompson Center, will serve as lead and champion for Woodstock Homeshare. As Director of The Thompson for 9 years, Deanna has a strong sense of related needs and awareness of the community they serve. Previous experience as the project manager for the corporate accounting department at Dartmouth Hitchcock as well as involvement in many local projects, provide Deanna with ample experience to champion and manage the Home Share project.

What will success look like? Please explain how you will know that you've achieved your goals. (250 words)

Success metrics for this project will be:

- 1.) Number of home share matches made;
- 2.) Number of persons served;
- 3.) Demonstration of viable operational / budgetary structure for program perpetuation;

Use of existing housing stock to the mutual benefit of homeowners and home seekers. Additional possible benefits include additional workforce housing and patronage for area businesses and organizations.

Project Budget Narrative: What will the grant funds be spent on? (200 words)

Grant funds will go towards program development and start up costs and to support program operations for a two-year pilot implementation, with the goal of testing and revising program operations so that the program can continue as part of The Thompson Center array of service offerings.

See attached project plan / budget for details.

Project Budget – Itemized. Please break-down/categorize the total project costs:

See attached project plan / budget

Income Category	Total	Applicant	EDC	Other	In-Kind
Total Income					

Expense Category	Total	Applicant	EDC	Other	In-Kind
Total Expenses					

Additional lines may be added or you may attach an itemized project budget. Please include both expenses and revenue, including pending and secured support. Material and labor in-kind support should be identified but might not be considered as matching funds.

Community Value

Your answers to the following questions will help the EDC evaluate your grant application according to the published funding rubric.

Tell us how your project enhances the beauty or improves the quality of life for Woodstock residents and visitors? (200 words)

Woodstock Homeshare addresses both the issues of affordable housing for non-homeowners and the ability of homeowners to maintain their ability to stay in their homes. Additionally, the home sharing program can be expected to address issues of social isolation and continuing independence among an aging population.

In what way will the proposed project contribute to the Woodstock's economic vitality? (150 words)

By providing an affordable housing option, home sharing may aid in workforce recruitment and retention and by potentially increasing population density in the Town / Village and to increase resident patronization of local businesses.

Will the proposed project attract new residents to Woodstock? If yes, explain how. (150 words)

The home sharing program has the potential to attract new residents who are seeking employment in Woodstock, but who may not otherwise have access to an affordable housing option. Additionally, by helping homeowners stay in their homes, house sharing could impact on the maintenance of Woodstock homes as primary residences, rather than conversion to second homes.

Tell us about existing community support for this project. How have community members been engaged in decision-making regarding this idea or project? You may attach a Letter of Support in addition to or in lieu of this question.

An "Aging at Home" survey that The Thompson conducted in September 2016 with more than 500 responses showed a strong desire for area residents to remain at home as they age. There was a specific interest and need expressed related to help for staying at home. Years of observation of our older population shows a large number of people living alone in large homes and often struggling with smaller tasks, or isolated. An exploratory kick-off meeting was hosted at The Thompson in May 2019 with HomeShare Now. Participants in the meeting included staff from The Thompson, HomeShare Now, Mount Ascutney Hospital and Community Health Team, Vital Communities, local volunteers, and Sally Miller of the EDC. Recent informal polling on the topic of home sharing, at the Thompson Center, on Facebook, and in the community has also shown interest from older homesharers/seekers and from the National Park for seasonal housing for park rangers.

Does the project have adequate funding for now and future years? (150 words)

The goal of this project and of this grant application is to support development and piloting of Woodstock Homeshare as an ongoing operation. While program fees will not support the costs of continuing operations, it is believed that with the in-place staff at The Thompson Center and with The Thompson's fund development abilities, an efficient and valuable program can be maintained. It is not anticipated that Woodstock Homeshare would be seeking additional funding from the EDC beyond the terms of the grant.

Please attach any supporting information, including letters of reference or other relevant information.

Signature indicates that you have read and agreed to the EDC Community Grant Guidelines 2019.

Submitted by: (First and Last Name)

Signature: Deanna Jones

Date: 5/29/19

Drafted 12/4/2018

Woodstock Area Council on Aging Operating Statement October 2017 through September 2018

Ordinary Income/Expense	<u>Oct '17 - Sep 18</u>	<u>Budget</u>
Income		
30100 - Contributions		
30120 - Home Delivery - Meals	15,461.00	14,000.00
30130 - Meals Donations	33,110.01	33,000.00
30135 - Scotland House - Meals	0.00	8,750.00
30140 - Memorial Fund	6,585.00	4,500.00
30150 - non cash contributions	1,350.00	0.00
30160 - Transportation/Sponsorship	5,025.00	4,720.00
30170 - Transportation/Van	7,185.93	7,000.00
30175 - Transportation/Scotland House	0.00	2,000.00
30180 - Aging at Home Donations	18,573.00	20,000.00
30190 - Untitled Donation	15,695.89	2,000.00
Total 30100 - Contributions	102,985.83	95,970.00
30200 - Fundraisers-Inc		
30210 - Annual Appeal	75,642.02	72,000.00
30220 - Christmas Bazaar	5,630.75	5,000.00
30230 - Dinner Dance Event		
30231 - Dinner Dance - Giving Tree	3,640.00	
30232 - Dinner Dance Sponsorships	35,900.00	28,000.00
30234 - Dinner Dance Dinner	24,975.00	22,000.00
30235 - Dinner Dance Raffle Tickets	5,870.00	8,000.00
30236 - Dinner Dance Donation	1,926.00	2,500.00
30237 - Dinner Dance Auction	0.00	0.00
30238 - Dinner Dance Silent Auction	10,595.00	8,000.00
30239 - Dinner Dance Live Auction	12,375.00	10,000.00
30230 - Dinner Dance Event - Other	0.00	0.00
Total 30230 - Dinner Dance Event	95,281.00	78,500.00
30240 - Major Donations	23,000.00	35,000.00
30245 - Aging at Home Initiative	0.00	3,500.00
30250 - Summer Event	3,845.00	0.00
30260 - Misc Events/Baked Goods	584.64	1,000.00
30280 - Senior Center Activities	970.50	1,000.00
Total 30200 - Fundraisers-Inc	204,953.91	196,000.00
30300 - Grants		
30310 - Grants - Other	25,700.00	40,000.00
30320 - Senior Solutions - Contract	82,468.46	85,622.00
30340 - Senior Solutions - Transport.	5,500.00	6,000.00
30350 - Stagecoach & VT Trans Transp.	9,924.22	10,000.00
30390 - Town Income	54,745.00	56,900.00
Total 30300 - Grants	178,337.68	198,522.00
30400 - Programs		
Newsletter Sponsorships	0.00	0.00
30410 - Education	5,048.80	4,500.00

Woodstock Area Council on Aging Operating Statement October 2017 through September 2018

	<u>Oct '17 - Sep 18</u>	<u>Budget</u>
30420 - Evening Events	1,760.00	800.00
30430 - Exercise Class	6,021.00	6,000.00
30440 - Newsletter	2,555.00	2,500.00
30450 - Senior Center Trips	5,074.76	6,000.00
Total 30400 - Programs	20,459.56	19,800.00
30500 - Rental		
30501 - Rental	2,136.83	3,500.00
Total 30500 - Rental	2,136.83	3,500.00
Total Income	508,873.81	513,792.00
Gross Profit	508,873.81	513,792.00
Expense		
40000 - Fundraiser-Exp		
40100 - Annual Appeal	2,387.36	4,500.00
40200 - Christmas	45.36	300.00
40400 - Fall Event	1,014.61	0.00
40500 - Dinner Dance		
40501 - Auction Event Software	1,499.00	1,500.00
40502 - Food Beverage	12,938.03	11,250.00
40503 - Marketing-Ads/Promotions	1,495.25	1,055.00
40504 - Printing-Invitations/STD	260.84	885.04
40505 - Decorations/Flowers	37.89	1,000.00
40506 - Posters-Auction Items	799.16	1,700.00
40507 - Entertainment	1,000.00	1,000.00
40508 - Paypal/Credit Card Fees	1,007.92	917.54
40509 - Postage	577.29	892.42
40510 - Office Expense	589.38	300.00
40500 - Dinner Dance - Other	0.00	0.00
Total 40500 - Dinner Dance	20,204.76	20,500.00
40900 - Miscellaneous Events	410.20	1,300.00
40925 - Fundraising	175.00	0.00
Total 40000 - Fundraiser-Exp	24,237.29	26,600.00
41000 - General & Admin		
Personnel Expenses		
41405 - Health Insurance	10,543.62	9,655.00
41410 - Taxes	22,456.59	23,250.00
41415 - Wages	270,517.05	270,000.00
41420 - Worker's Comp Insurance	7,195.05	7,282.00
Personnel Expenses - Other	0.00	
Total Personnel Expenses	310,712.31	310,187.00
41100 - Accounting & Audit	8,000.00	8,000.00
41105 - Advertising & Marketing	2,409.93	4,900.00
41110 - Annual Meeting	1,192.60	750.00
41115 - Bank Charges	192.68	300.00
41118 - Board Events	0.00	100.00

Woodstock Area Council on Aging Operating Statement October 2017 through September 2018

	<u>Oct '17 - Sep 18</u>	<u>Budget</u>
41130 - Dues & Subscriptions		
41131 - My Senior Center	1,500.00	1,500.00
41133 - Donor Perfect Dues	0.00	3,500.00
41130 - Dues & Subscriptions - Other	1,387.98	1,750.00
Total 41130 - Dues & Subscriptions	<u>2,887.98</u>	<u>6,750.00</u>
41132 - Software Annual Maint.	3,264.00	0.00
41135 - Employee Appreciation	1,428.31	1,250.00
41140 - Equipment Maintenance & Repairs	2,881.29	5,425.00
41141 - Copier Lease	0.00	5,720.00
41142 - Phone System Lease	0.00	0.00
41145 - Directors & Officers Liability	1,194.00	1,150.00
41150 - General Insurance	6,155.62	6,549.00
41155 - Umbrella	873.45	913.00
41160 - Interest expense-capital leases	1,070.14	
41165 - Memorial Expenses	394.65	100.00
41170 - Mileage	427.46	250.00
41200 - Occupancy		
41201 - Alarm maintenance	370.00	375.00
41205 - Building Maintenance & Repairs	6,495.35	7,250.00
41210 - Building / Cleaning Supplies	1,382.09	1,000.00
41215 - Cable & Internet	1,733.70	1,666.00
41220 - Electricity	10,192.94	12,000.00
41225 - Elevator Maintenance	3,010.30	3,305.00
41230 - Generator Maintenance	480.00	700.00
41235 - Heat & Gas	7,751.96	7,400.00
41240 - Kitchen Maintenance and Repair	3,081.14	2,500.00
41245 - Lawn Care	2,128.98	1,899.00
41250 - Sewer	772.56	750.00
41255 - Snow Removal & Driveway Maint.	5,115.33	3,925.00
41260 - Sprinkler System	2,274.60	3,000.00
41265 - Trash Removal	2,189.76	2,900.00
41270 - Water	825.34	800.00
41200 - Occupancy - Other	1,070.67	
Total 41200 - Occupancy	<u>48,874.72</u>	<u>49,470.00</u>
41300 - Office Consumables	9,463.46	4,000.00
41500 - Postage	1,387.46	1,800.00
41505 - Postage - Newsletter	3,051.02	2,750.00
41510 - Telephone	2,611.95	3,034.00
Total 41000 - General & Admin	<u>408,473.03</u>	<u>413,398.00</u>
41600 - Program		
Activities		
41610 - Education	3,263.60	3,000.00
41615 - Evening Events	0.00	750.00
41620 - Exercise Class	5,349.40	6,500.00

Woodstock Area Council on Aging
Operating Statement
October 2017 through September 2018

	<u>Oct '17 - Sep 18</u>	<u>Budget</u>
41625 - Fees	1,420.00	1,650.00
41630 - Newsletter	1,541.17	1,450.00
41635 - Senior Center Trips	4,897.93	6,000.00
41638 - Stagecoach Shopping Trips	1,643.60	2,500.00
41639 - Senior Center Activities	2,084.50	0.00
41640 - Supplies	1,590.34	1,500.00
41645 - Training	980.74	1,000.00
41650 - Volunteer Recognition	1,361.89	1,000.00
Total Activities	24,133.17	25,350.00
Consumables		
41655 - Food	70,552.18	67,000.00
41660 - Kitchen	12,242.47	9,750.00
41665 - Misc Events/Baked Goods	12.30	0.00
Total Consumables	82,806.95	76,750.00
Vehicle		
41670 - Gas	7,332.46	6,000.00
41675 - Insurance	2,582.88	3,075.00
41680 - Auto Lease	0.00	4,467.00
41685 - Maintenance and Repair	2,102.29	2,500.00
41690 - Van Telephone	673.58	0.00
41695 - Vehicle Sponsor	390.00	400.00
Total Vehicle	13,081.21	16,442.00
46000 - Depreciation Expense	0.00	
Total 41600 - Program	120,021.33	118,542.00
42000 - Contingency Fund	0.00	5,252.00
Total Expense	552,731.65	563,792.00
Net Ordinary Income	-43,857.84	-50,000.00

DATE: May 29, 2019
TO: Woodstock Economic Development Committee
FROM: Director of Community Health
SUBJECT: Grant Request for Startup Funds to Develop a Satellite Home Share Office

It is a pleasure to support the Thompson Senior Center application for startup funding to develop a Home Share Satellite Office.

As Director of Community Health at Mt. Ascutney Hospital and Health Center, I was responsible for the organization and implementation of our recent Community Health Needs Assessment. For the first time in 10 years, housing was identified as 1 of the top 8 community health needs. The need for more low income housing was identified in each discussion group, as were the relationships between this issue and other community health issues, including substance misuse, family stress and childhood trauma. About 34% of households in the MAHHC service area have housing costs over 30% of household income, and about 33% of household units are categorized as substandard.

We have long admired work of Home Share in Vermont. There are many different reasons why people consider home sharing. Some people have extra room available in their home and like the idea of having someone around the house. Some may need help with household chores to remain living comfortably in their home. Others may want to supplement their income or help someone save money by offering affordable housing. Home sharing offers companionship and security to those who do not like living alone. Home sharing is affordable living. Home sharing offers a convenient, affordable way to give and receive household services.


Home Share as an organization has the expertise to provide structure in a process that ensures a safe evaluation of both the person offering the home and the person seeking to share the home. There is an interview process, reference checklist, matching process and education for all involved concluding with a home sharing agreement and follow-up. Home share also helps with both education and conflict resolution in the transition of building a home sharing relationship.

We have confidence and the utmost respect for Thompson Senior Center as a leader in our region. Deanna Jones is a capable, engaged and wise administrator. She is involved in almost every aspect of care for the elderly in our region. She has developed programs and services that bring quality to the lives of those who participate. We believe that the leadership of Thompson Senior Center is an asset to this program.

Mt. Ascutney Hospital and Health Center commits to partner in this effort. We believe that home share is a piece of the puzzle that will improve the housing instability and vulnerability so often experienced by our elders seeking to remain in their homes and middle-age citizens seeking an affordable housing situation.

Please do not hesitate to contact me with any questions or concerns you may have. I recommend full support for the Thompson Senior Center's application for startup funding for a full Home Share Program.

Respectfully,



Jill Lord, RN, MS
Director of Community Health