



Desert Village Initiative, Inc.

First Annual Report –

An Introductory Letter

Maurice G., 83, suffers from the physical limitations caused by diabetes and an assortment of other ailments. Small household tasks that he was once accustomed to performing routinely have become onerous and often insurmountable challenges. Recently a minor malfunction in his bathroom sink became more than just an inconvenience; it evolved into a real problem. A call to Neighbors 4 Neighbors produced a talented handyman with plumbing experience. He quickly corrected the errant faucet.

Tom S., 77, who, because of disability, does not drive, found himself in a classic catch-22 quandary. He had an appointment at Eisenhower Medical Center for a life-critical test. However, his unfailingly reliable chauffeur, his wife Patricia, was confined to bed on doctor's orders. Tom called Neighbors 4 Neighbors, and a "pickup and delivery" was scheduled to enable Tom to keep his vital appointment.

Sally B., 90, who lives alone, regards herself as generally self-sufficient and self-reliant. But recently she contracted a debilitating virus attack that made her essentially bedridden. With food supplies running low, and unable to drive, Sally called Neighbors 4 Neighbors. A sympathetic volunteer picked up Sally's grocery list and money, shopped at nearby MarketPlace, and soon returned to restock Sally's cupboard.

Mary, G., a young woman in her fifties, joined DVI because she suffers from an illness that limits her mobility and leaves her unable to drive. She also became an N4N Volunteer, supporting the program from her home using her computer.

Gere H., 66, whose wife does not drive, broke his ankle playing tennis. He was able to get around thanks to Neighbors 4 Neighbors, for the few days until he was comfortable driving with his new cast.

The incidents described above are all true. Only the names have been changed to respect the privacy of the individuals involved.

In the Sun City Palm Desert community of approximately 9,000 residents, about 7,200 are over age 65. They are representative of a demographic of Americans aged 65 or over whose number is expected to double, to 71 million by 2030. Neighbors 4 Neighbors is in the first stage of responding to this cadre of people who seek to insure themselves against isolation, who want to remain part of the community they helped to build, avoid institutionalization, and who are eager to utilize our community's abundant and varied resources and amenities.

In its initial phase of operations, Neighbors 4 Neighbors has provided such services as rides to local destinations, help with simple household tasks, emergency pet care, check-up phone calls to confined residents and, soon to be implemented, temporary loans of medical equipment, such as wheelchairs.

In its next phase of development, Neighbors 4 Neighbors plans to provide a concierge service of referrals to vetted professionals for in-home care, caregiver relief, major home repair, and access to social services.

As of September 5, 2011, Neighbors 4 Neighbors, a bare six months after its launch date of March 1st, had 245 member households and 159 volunteers. It continues to grow vigorously, led by a highly engaged Board and a group of reliable, qualified volunteers.

It draws its financial support from annual member dues, philanthropic organizations, and pro bono and in-kind donations.

As one member noted, "Neighbors 4 Neighbors is an idea whose time has come, and none too soon."

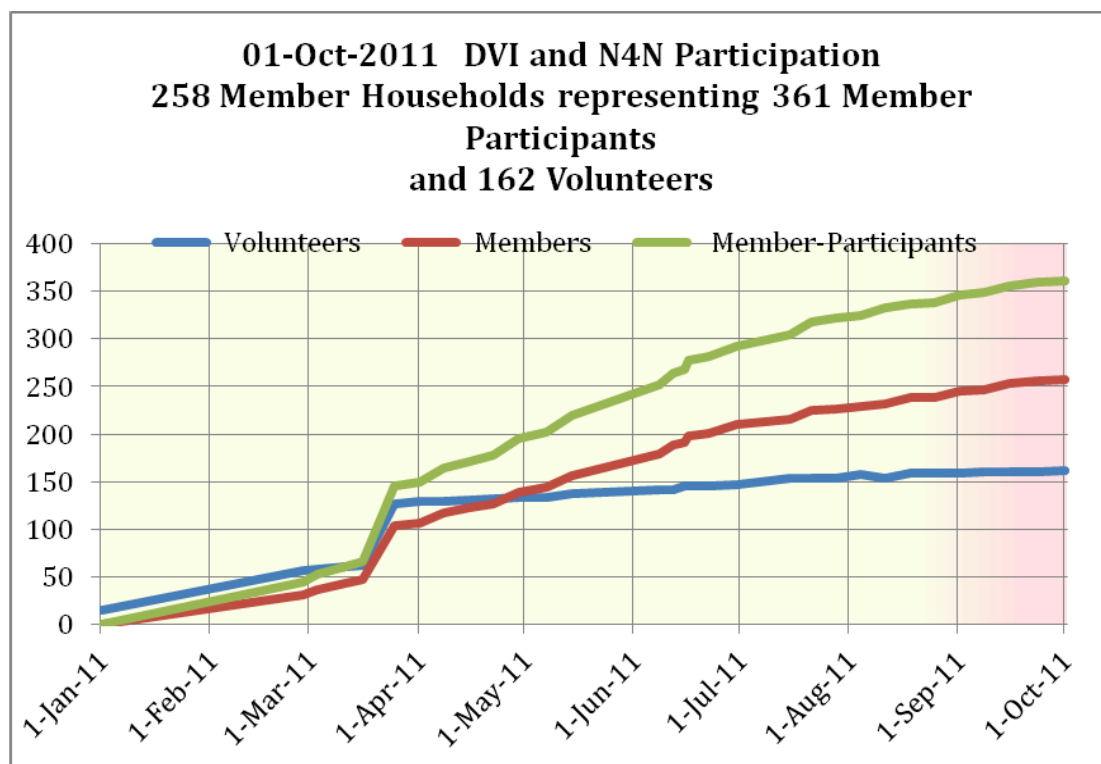
The following comprehensive report on the Desert Village Initiative, the parent organization of Neighbors 4 Neighbors, documents its history, developments, achievements, expectations and ambitions.



Desert Village Initiative, Inc. – First Annual Report

Phenomenal Success!

Growing from zero to 258 member households (361 people) and 162 volunteers in a very short time has been a major success story, which we are enthusiastically committed to continuing. Here's a chart showing our growth since January when we began actively recruiting members and volunteers in anticipation of a March 1st service launch date:



WHY AND HOW DID WE BEGIN? The Desert Village Initiative, Inc. (DVI) grew out of the recognition by the SCPD Community Association Board that the graying of Sun City Palm Desert residents called for some sort of action. The aging of residents had long been noted, but at nearly 20 years since its inception, that the community was aging *in place* was becoming impossible to ignore. In the most recent survey available, from September 2010 with a 40% response rate, about 40% of the responders are between the ages of 65 and 74 (extrapolating to the entire community population of 9,000, that equates to about 3,600 people); 37% are between 75 and 84 (3,330 people); 4% are 85-90 (360); 2% are over 90 (180). Over 20% live alone. Many no longer drive, and most should not climb ladders any more. Clearly, these neighbors need help.

In February 2010, the board of the SCPD Community Association took action, chartering the Aging in Place Ad Hoc Committee to investigate aging-in-place programs to better understand the benefits of such a program for their residents. Following several months of research, the committee recommended that a non profit corporation be established, independent of the community association. A non profit could apply for private and government grants. In June 2010, the SCPDCA Board of Directors accepted the recommendation of the committee. Eight of the original Aging in Place Committee members signed on to form the new non profit, and decided to call it the Desert Village Initiative, Inc., the term “village” reflecting the nationwide trend toward membership-based groups of volunteers within communities, who help their neighbors. Very simple!

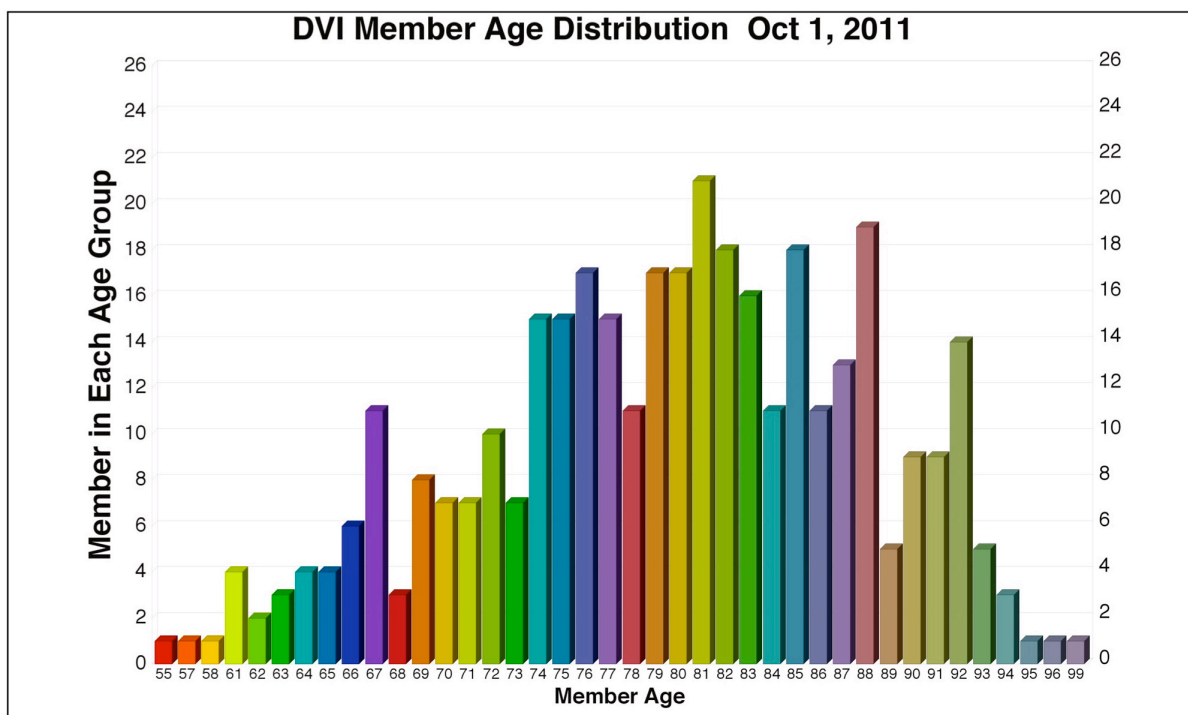
Through the rest of 2010, the new group achieved remarkable progress. We:

- formed a board of directors
- assessed ourselves \$1600 for start-up funds
- gratefully accepted the Association’s attorney’s offer of help on a pro bono basis
- went forward with all legalities and the paperwork for incorporation and 501(c)(3) non profit status
- named officers and established a steering committee
- developed a business plan and bylaws
- developed a website (www.desertvillage.us)
- developed databases for record keeping
- opened a bank account and set up financial records, drawing financial support from member

dues and pro bono and in-kind donations

- arranged for D&O, liability and umbrella insurance that covers our volunteers *as well as* the SCPD Community Association
- designed the procedures for the service teams, wrote a *Procedures and Policies Manual*, an organization chart, a “jobs available” list with job descriptions, and, most significantly,
- put into place its most essential component, the Neighbors 4 Neighbors volunteer group, with its own chairperson, teams of volunteers and team co-leaders, an orientation program and training materials, job descriptions, schedule and timekeeping forms, and feedback cards.

In December of 2010 DVI launched a continuing public relations campaign among the residents of SCPDCA, with the very gratifying results noted above. Clearly, SCPD residents are overwhelmingly in favor of this new program. Interestingly however, DVI members comprise all age categories, not only, as you might expect, the older component of our population. Here is another chart showing the age distribution of our members to date:



HOW DID WE DECIDE ON WHAT SERVICES TO OFFER? HOW DID WE ASSESS AND PRIORITIZE COMMUNITY NEEDS?

Because of the activity-oriented nature of the SCPD Community Association, with over 80 clubs and groups providing an astonishing range of activities, it was not necessary for DVI to provide cultural, recreational or health/fitness activities like most “villages” do. Instead, based on discussions with residents, it was apparent that DVI should concentrate on the unmet needs: local transportation and handyman services.

Although there were some handymen and drivers already available to SCPD residents, word of their existence was available only to those with computers and access to email and Ruth’s List, and the services were not always free of charge. The anecdotal needs assessment was strengthened by DVI’s interaction with outside agencies which are concerned with senior issues in like or similar environments such as the Riverside County Office on Aging, the Indio Senior Center and Elderhelp in San Diego, and with similar Sun City organizations in northern California and Nevada,. The list of help-needed priorities was always the same and headed by transportation and handyman services.

There have been other suggestions for services as well. For example, in an April 2011 a focus group approved of the services offered by DVI, but asked for others: a medical equipment loan program, information about existent social services that members may be eligible for, and an eldercare ombudsman who could help with Social Security and other programs.

WHAT EXACTLY ARE THE SERVICES WE NOW OFFER?

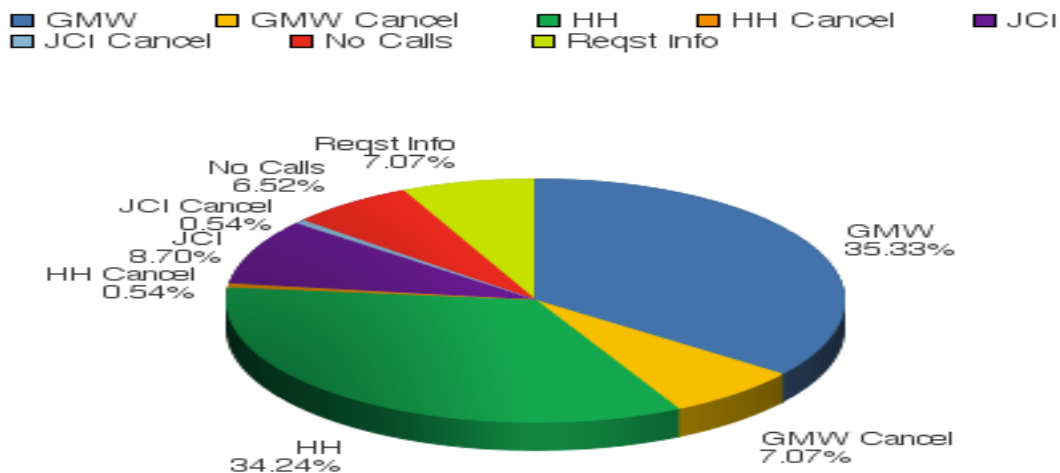
We are now in Phase I of three:

Phase I: Has been an extraordinary achievement on such a short time. All SCPD residents are eligible to join DVI to receive services. An annual, tax-deductible membership fee of \$50 per household entitles members to the following Phase I “core” services free of charge, which have been on offer since March 1, 2011:

- Just Checking In (JCI) – A daily telephone call.
- Helping Hands (HH) – Assistance with minor household tasks such as climbing a ladder to replace a battery in a smoke detector or providing assistance with routine electronic and technological challenges like programming a thermostat.

- Going My Way (GMW) – Transportation to community activities, shopping, appointments or worship.
- Pet Assistance – Short term, emergency pet assistance when a member is ill, or a ride to the vet for a member unable to drive.

In just three months, the N4N Dispatch had handled 184 calls from DVI members requesting services or information. Here is a Service Activity Pie Chart:



- A medical equipment loan program is shortly to be offered a year ahead of schedule. In a serendipitous encounter at a bridge game, a DVI board member casually mentioned the need for a storage module for the equipment. A fellow bridge player turned out to be a retired executive of FedEx. A monster trailer valued at \$4,200 was donated (at a cost of \$1), and delivered (free) three weeks later, and now is filled by another serendipitous donation: surplus medical equipment from the Foundation Assisting Seniors at Sun City Anthem. Another idea is to loan “Grandparents’ Equipment”: cribs, car seats and highchairs.

Phase II: In the subsequent year, as funding and membership grow, DVI plans to offer (through partnerships, group purchases and negotiations) a “Call the Concierge” program for referrals to vetted professionals for services at a cost savings, where members will pay the providers directly. Examples are in-home personal care, in-home health care, care-sharing, caregiver relief, medic-alert medallions or email technology, home maintenance and major repair, scheduled door-to-door transportation, a bill paying service, easy access to

information about existent social services that members may be eligible for, and an eldercare ombudsman who could help with Social Security and other programs, and a referral service for local assisted living facilities. Subsidized transportation will also be attempted.

Phase III: The name “Desert Village Initiative” reflects the long-range intention in Phase III to offer the village concept and the advantages of the DVI non profit to the three or four other active adult communities in the Coachella Valley, an estimated 10,000 homes and perhaps 18,000 people, whose populations will be graying in time and aging in place.

HOW DO WE KNOW HOW WE'RE DOING? Each member receiving a face-to-face service from a volunteer driver or handyman receives a feedback card inviting him or her to comment; each card that is returned is analyzed for possible action. Team leaders receive feedback from their team's volunteers and from the dispatchers who receive the requests for services; this feedback is discussed and analyzed for possibilities of service improvement or enhancement; certain procedures and policies have been adjusted as a result, one example being the clear need for more volunteers who are year-round residents, since the volunteer ranks are somewhat depleted in the summer months. The result has been the launch of a mid-summer volunteer recruiting campaign. Data on services delivered is produced from the database and analyzed; one result is the absorption of the Pet Assistance Team into the handyman and driver teams, due to lack of calls for pet assistance. The focus group mentioned above provided valuable ideas for the future. These feedback loops will continue, and be complemented by a more formal satisfaction survey to be sent out at membership renewal time, going to all members and active volunteers, requesting responses to specific questions, rather than the open-ended comment cards.

WHAT IS OUR ORGANIZATIONAL STRUCTURE AND THE OPERATIONAL PROCESS?

The five members of the DVI board of directors, with the help and advice of the Steering Committee, set policies for DVI and for the volunteer group, Neighbors 4 Neighbors, or N4N.

Here's an overview of the operational process:

- A board member empties the mail box each day, retrieving correspondence, feedback cards, and membership and volunteer applications and checks. These are scanned and forwarded to

the Membership Coordinator, the N4N Chairperson, and the DataMaster for keying and to the Treasurer for recording and bank deposit.

- The Membership Coordinator contacts new members and familiarizes them with the offerings and phone number to call for services. The N4N Chairperson interviews all volunteers, assigns them to the teams of their choice, notifies the appropriate team leaders, and then schedules them for an Orientation session. The Team Leaders, two for each team of services plus Dispatch, arrange for training and scheduling of new volunteers.
- When Members call for services, they reach a cell phone manned Monday through Friday, 9:00 to 5:00, by a Dispatcher (one of a team with its own team leaders), who answers the call with a cheerful “This is Neighbors 4 Neighbors! How can we help you?”
- The Dispatcher then logs the request, and contacts and dispatches a volunteer. The completion of the service call, along with the time expended and miles driven, are reported back to the Dispatcher for logging. The Dispatch log is keyed weekly into the database, giving important data for capture of performance information and in-kind donations.
- All supervisory and support staff members keep timesheets which are keyed, also for capture of in-kind donation data.
- Feedback cards are provided to Members receiving services, and cards returned are analyzed and programs adjusted appropriately. The team volunteers exchange information, concerns and suggestions with their team leaders on a regular basis. Monthly, a Team Leaders meeting, attended by board members, is conducted by the N4N Chairperson, where concerns are discussed and resolved.
- Periodically the board meets to discuss policies, new service opportunities, fundraising, and next steps.

WHO ARE OUR KEY STAFF? (HINT: WE ARE *ALL* VOLUNTEERS! NO PAID STAFF!)

Board: (President, Vice-President, Secretary, Treasurer, and Member at Large) gives overall direction, sets policies, adjudicates issues, provides vision of future; investigates options for strategic partnerships; writes grant requests; receives checks, pays bills and keeps financial records, answers requests for information; provides insurance.

Steering Committee: (Board, Former board president, Membership Coordinator, N4N Chairperson, and one team leader from each team) advises and supports board in overall direction, setting of policies, adjudication of issues, envisioning the future.

Data Master: is also member of Steering Committee: ensures capture of all data on members, volunteers, services provided, and time spent, for performance metrics.

Membership Coordinator: is a vice president of DVI and a member of the Steering Committee, contacts new members, reviews and ensures member understanding of parameters of program.

N4N Chairperson: is a vice president of DVI and a member of the Steering Committee, coordinates and holds monthly meetings with Team Leaders; builds morale, welcomes and interviews all new volunteers, assigns to teams of their choice or to other tasks for which they might qualify, notifies Team Leaders of new team members, is available to handle problems that may arise, reviews and handles feedback from members and from volunteers and Team Leaders, is alert for and refers to board issues needing adjudication or adjustment of procedures or policies, makes recommendations with regard to best courses of action, implements board's decisions.

Team Leaders: each welcomes, interviews and trains their team's new volunteers, creates weekly schedules and makes schedules available to Dispatch Team, is available to handle problems, recognizes and refers unresolved or new issues to N4N Chairperson with recommendations for resolution, has regular team meetings, builds morale, reinforces training, implements and ensures compliance with changed procedures.

Fundraising Team: organizes events to raise funds from within the community and from local merchants; possibilities include an annual golf tournament, regular bingo games, and parties featuring raffles for valuable donated prizes.

Grant Writing Team: One board member is presently filling this position; recruits are needed.

Public Relations/Marketing Team: needs to be developed; functions presently performed by a board member.

Process and Procedures Manager: needs to be developed; functions presently performed by a board member.

WHO ARE DVI'S KEY PARTNERS?

- **Neighbors 4 Neighbors** – First, of course, is Neighbors 4 Neighbors, the resident group of 162 volunteers providing the services typical of a village.
- **The SCPD Community Association:** Although DVI's relationship with the SCPD Community Association is that of separate and unrelated entities, the fact that DVI's volunteer organization Neighbors 4 Neighbors is an official Resident Group allows valuable access to the community newsletter, bulletin boards, flyer carousels, meeting rooms, and CCTV channel. N4N also benefits greatly from the cooperation of the Association's Community Standards Director and the on-campus contracted security company. Their officers aid the N4N volunteers in case of a "no-answer" to the daily phone call requested by a member; in certain circumstances an officer approaches the home of the non-answering member and attempts to discover his/her status.
- **SCPD's chartered clubs:** As can be seen by the list of generous donors on our website's opening page, several clubs see the village as an unprecedented benefit to home ownership in SCPD, and have donated funds to the project. Their generosity can be expected to continue, particularly as membership and ranks of volunteers have been growing.
- **SCPD's religious-based resident groups:** both the Friendship Church and the SCPD Jewish Services are partnering with DVI/N4N on the medical equipment loan program.
- **SCPD Community Association's corporate attorney:** Legal services for establishment of the California corporation and to obtain non-profit status from the IRS have been donated by the SCPDCA corporate attorney. He continues to offer his services free of charge because of his deep agreement with the project. His services to date represent \$3,500 in pro bono work.

WHAT ARE OUR PLANS TO SUSTAIN DVI AND NEIGHBORS 4 NEIGHBORS?

Annual memberships at a projected level of 500 households will generate \$25,000. In addition, volunteers, who each donate \$10 per year, help defray the cost of liability insurance. Thus, projected membership and volunteer revenues will enable DVI to provide the insurance, advertising, software and website domain licenses, cell phone service for our Dispatchers, and office supplies for its original core services for the foreseeable future. In-kind and pro bono donations of time, office supplies, and gasoline to date are DVI's life blood, representing about \$50,000 value to date. DVI believes it can sustain its core services without outside help for the

foreseeable future, but of course hopes to do much more. Here is our financial report as of the end of our first (partial) fiscal year of operations:

DESERT VILLAGE INITIATIVE, INC.
Neighbors 4 Neighbors
Statement of Operations, Unaudited

Year Ended June 30, 2011 (Membership began on January 2)

Operating Revenues

Membership fees		\$ 10,450
Contributions:		
Volunteer	1,460	
Other	2,352	
		<u>3,812</u>

Gross Operating Revenues

14,262

Operating Expenses

Advertising and Promotion		400
Dues and Subscriptions		350
Fees and Licenses		870
Insurance		3,375
Office		116
Postage and Delivery		14
Printing and Reproduction		171
Rent:		
Mailbox	85	
Storage Vehicle Space	600	
		<u>685</u>
Supplies		567
Telephone		423
Website		<u>308</u>

Gross Operating Expenses

7,279

Operating Surplus

\$ 6,983

Note: The organization received a non-cash contribution from FedEx of a storage trailer to house medical equipment, valued at \$4,300.

Phase I consolidation will be achieved with 500 members and fully operational Dispatch, GMW, HH, PAT, JCI and Medical Equipment Loan services. Phase II consolidation will be achieved with full implementation of the Call the Concierge program of referrals to vetted professionals, and subsidized transportation. Phase III will be achieved in the out years when DVI migrates the village concept to

the three other active adult communities in the Coachella Valley, comprising another 18,000 over-55 people.

CLEARLY, WE BELIEVE IN WHAT WE'RE DOING. We believe in our mission. We believe we are providing an enhancement to the already outstanding community of Sun City Palm Desert, in the spirit of the Good Samaritan who stopped to help, instead of looking the other way. Truly, ours is a community of friends and neighbors who help each other, making life just a little bit easier.