

Evolution of I'On At Home

Beginning with an initial meeting of six friends and I'On residents in January, 2015, the Aging in Place Work Group (now renamed I'On At Home {IAH}) explored the potential of creating an "aging in place" program for the I'On community.

Accomplishments:

January – April, 2015: The original Work Group conducted research about the national movement and similar organizations locally, statewide, and beyond. Members visited with representatives of various groups whose missions focused on services, activities and advocacy for older adults. The group connected with community resources and gathered data, using the resources of the Village to Village Network website. A Work Group member met with the I'On Assembly Board in February to apprise them of the group's activities and received their endorsement. A progress report was included in the April *Living in I'On* newsletter, and an open community meeting was planned to report to I'On residents.

May – August, 2015: The Work Group conducted two open meetings with over 100 individuals attending in May and June. Based on the interest expressed by attendees, the Work Group conducted a survey of all I'On households about their interest in "Aging in Place," with 346 surveys completed and returned. Results of the survey were posted on the I'On Community website. Forty-nine percent of the respondents expressed an interest in aging in place and a willingness to be involved in some capacity.

September – December, 2015: An expanded leadership group, the Steering Committee, began meeting in September. After several weeks of brainstorming on what needed to be accomplished, they selected a name, "I'On at Home," developed a mission statement, and wrote a business plan. They formed four subcommittees, each of which would deal with one of the goals in the plan: Structure, Members, Volunteers, and Programs. They agreed that a fifth subcommittee, Marketing and Communications, would be developed when needed. The Steering Committee chose officers: Brenda Uttaro, Chair; Bill Settlemyer, Vice Chair; Becky Van Wie, Secretary, and Kay Chitty, Treasurer. Other members were Lori Bate, Barbara Cole, Barbara Fowler, Anne Register, Mary and Don Wilbur, and M.P. Wilkerson. The group set goals for the first quarter of 2016. They committed to hosting a social/informational event early in 2016 that would be open to all I'On residents to update the community on IAH activities. Updates were also included in the I'On community newsletter.

January – May, 2016: The Steering Committee determined that financial donations should be requested to support the work necessary for IAH to become a functioning nonprofit. Every Steering Committee member made a contribution. A meeting was held on February 25 to update neighbors on progress and to ask for their support as donors and/or volunteers. More

donations and indications of interest resulted. In March, IAH became a regular member of the Village to Village Network and requested a mentor Village to help guide its development. The mentor assigned was Carolina Villages in Chapel Hill, NC. It was determined that a series of Living Room Chats would be held in April to allow interested neighbors to ask questions and offer input about IAH. Five chats were held at the homes of Steering Committee members, and approximately 40 people attended. The enthusiasm for IAH was still very apparent. On May 4, word was received from the Secretary of State's office that IAH had been incorporated as a nonprofit in the state of SC. This was a first step in applying to become a tax-exempt charity. The Steering Committee held a retreat in late May with the Executive Director of Carolina Villages and convened the official organizing meeting during the retreat. Bylaws were approved, directors and officers were elected from the Steering Committee group to become the initial Board of Directors of IAH, Inc. A December, 2016 date was set for the first Annual Meeting of the IAH Board.

June – November, 2016:

In June, work was completed on the 501(c)(3) application to the IRS. The Marketing and Communications Committee evolved from the Programs/Services Committee and a Finance Committee was also formed. The Structures Committee evolved into the Executive Committee. Each committee began working on the objectives of its work plan, based on the business plan, to complete the organizing phase of IAH. A launch date was set for March, 2017. Forty neighbors provided generous financial report to cover the costs of putting the IAH structure in place, which also gave evidence to their belief in the value of such a program for the I'On neighborhood. Two social/educational activities were held during the summer months, an exercise/nutrition program in June and a wine tasting in August. A cybersecurity workshop was held in September and a Celebrity Chef event in October.

In mid-August, word was received that our IRS application had been approved. I'On At Home became a tax-exempt, charitable organization.

November – December, 2016:

Committees developed detailed policies and procedures to guide their work and give direction to subsequent committee members. A timely workshop to provide management Hints for Visiting Grandchildren was held in early November. A succession plan for the Board and officers was put in place. The first Annual Meeting of I'On At Home was scheduled for December 6, at which time officers and Board members for 2017 were elected. The 2017 Budget was also approved.

As our official "launch" year, 2016 was a significant time for I'On At Home. Our leadership was stable, with a 12 member Board of Directors, including two new additions. Directors included Lori Bate, Kay Chitty, Barbara Cole, Barbara Fowler, Bob Fry, Anne Register, Bill Settlemyer, Brenda Uttaro, Becky Van Wie, Fred White, Don Wilbur, and Mary Wilbur. Officers were Brenda

Uttaro, President; Anne Register, Vice President; Becky Van Wie, Secretary; and, Kay Chitty, Treasurer.

January – March, 2017

The Board decided that the IAH “launch” date would be March 1, 2017. The Membership Committee, along with other committees and the entire Board, worked on plans for the formal membership campaign. In January, a special reception was held to thank our 2016 financial donors and tell them about IAH membership. There was also an informational reception for all interested I’On neighbors. Finally, e-mail member recruitment messages were sent to prospective members, and the committee followed up with e-mails, phone calls, and personal visits.

Meanwhile, the Program Committee was busy planning a diverse range of events and activities. At the same time, the Volunteer Services Committee developed plans to recruit, train, and manage the volunteers who would assist our members with tasks such as simple household chores, transportation, technology, etc.

We worked with Helpful Village to develop our website, which included a membership database and event listings where members could register to attend.

March – December, 2017

By our April 4, 2017, Board meeting, we had 60 memberships. Thanks to continuing efforts, memberships slowly came in throughout the rest of the year, resulting in a total of 74 (representing 120 individuals) by the December 5th meeting. We surpassed our goal of 70 memberships for 2017 by nearly 6%.

At the same time as members were being solicited, volunteers were also being recruited to deliver services to those members. By our 3/1/17 launch, we had 24 volunteers trained, vetted, and ready to go. A dedicated corps of volunteer Call Managers monitored the IAH phone and e-mails and responded to members’ requests.

In May, we hired Arlyn Stoy as our Member Services Coordinator at 15 hours/week. Her excellent assistance made the jobs of key Board members much more manageable.

One challenge in this period was that there were very few requests for volunteer-provided services. This meant that our volunteers group, which continued to grow in numbers, had very little to do. We tried various ways of encouraging members to use this benefit, without a great deal of success.

While this situation has been frustrating for the Volunteer Services Committee and the volunteers themselves, it was not entirely unexpected. Presently, our members are almost all relatively healthy, active, and independent. We believe this will (unfortunately) change over the

next several years, as we all “progress in life.” As this change occurs, our members will need more assistance with household simple maintenance and repairs, transportation, meals, friendly visits, etc.

The Programs Committee continued their excellent work of planning and delivering interesting and varied events, almost all of which were well-attended. These activities and other IAH news were communicated to members through a monthly e-newsletter and weekend event reminder e-mails.

We ended the year in good financial shape, thanks to our members and supporters. Income was higher than projected, and expenses were lower.