



TulalipCares.org

Tulalip Charitable Contributions Funds Distribution Report

NAME OF AGENCY: Wider Horizons

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GENERAL GOALS: Our mission is to enable older residents of Central Seattle to participate in an intergenerational community that shares knowledge, experience and services with each other so living is easier and more joyful. We do this by providing, vetting, and recommending resources so adults can remain in their own homes for as long as they choose.

SPECIFIC USE FOR THIS AWARD:

This award was used for general operational needs and program administration.

For more information, please see the attached report from Wider Horizons.

Report to Tulalip Tribes Charitable Fund from Wider Horizons 2015-2016 Activities

Grant Amount: [REDACTED]

Grant #: Q4 2015 14.2

Website: www.widerhorizonsvillage.org

Our Mission and Vision

Wider Horizons' mission is to enable older residents of Central Seattle to participate in an intergenerational community that shares knowledge, experience and services with each other so living is easier and more joyful.



We do this by providing, vetting, and recommending resources so adults can remain in their own homes for as long as they choose. We offer members a harmonious blend of health and in-home services, shared social and cultural activities, and community engagement—all designed to foster belonging, security and contribution.

Our vision is that elders are fully treasured as an integral and contributing part of our vibrant, caring community where all of us are comfortable, connected, useful and respected. Sharing resources, precious memories, joys and concerns, we work to create a *Community of Belonging* and an inspiring village for the 21st century.

Membership Acquisition

When Wider Horizons opened in June 2015, we counted 70 people on our membership roster. This included a half-dozen people who had not yet paid their dues. It turned out that those individuals decided to delay joining, so we removed them from the roster. Since then, we have added another fifteen members. Therefore, we currently have 79 members, with another several in active contemplation. Our list of prospective members stands at 135 and grows each month. The rate of member acquisition is predicted to be two new members each month for the balance of 2016. Although we once estimated a higher rate of member acquisition, two a month seems about right for our ability to “on-board” them appropriately.

Between Spring 2015 and Spring 2016, we held 12 prospective member gatherings in the homes of members or friends and in the common rooms of condos or apartments. This has been our primary member recruitment tool, with nearly 50% of our members having attended one or more home gatherings. We will continue to hold these gatherings, but the primary recruitment method has become word of mouth from satisfied members.

In addition, we have held or spoken at 10 large community events or conferences. These speaking engagements, which occur every other month or so, are an important marketing tool. The Wider Horizons website is of increasing importance in drawing potential members and volunteers to our organization.

Seven all-member meetings have been held since June, 2015. These included two Open Houses (at our launch and in early May of 2016) and they have served to move prospective members into membership as well as build awareness and spirit among existing members. This community-building extends to the broader community). The attendance at these has ranged from 25 to more than 100. In future we expect to hold about six of these each year, as well as hosting one or more smaller monthly events each month.

Community-Building

Community-building is the central principle of our village. We include our volunteers and the wider community in this effort and it is both woven into everything we do and can be teased out as follows from some of our accomplishments:

- All 79 members have been assigned to a fellow-member interviewer. We developed a package of forms and trained about a dozen members to perform this important function. Each interviewer has met an average of six members and each interviewed member has gotten to know at least one other member.
- Data from all of the interviews has been entered in our Club Express database. These data reflect members' interests in activities, services and volunteering.
- A member Activities Work Group planned and carried out two all-member (and key volunteer) social events:
 - An evening picnic at Volunteer Park attended by 25 individuals.
 - A Meet & Greet hosted by our bank at its Capitol Hill branch had a similar attendance.
- A group garage sale in August raised \$720 and also engaged members and people from the wider community. And it provided an opportunity for members to de-clutter their homes.



Member Services

Activities

- In addition to the all-member social activities, a small group planned an initial set of activity offerings that was unveiled to members in September. These activities grew out of member interests as expressed in interviews and also from sign-ups by people who attended the Meet & Greet.
 - A work group comprised of two members and two volunteers developed a set of “Conversations about Aging” topics. Spearheaded by another member, these conversation groups typically meet in members’ homes.
 - A Book Group and Magazine Group are both meeting regularly.
 - *Warm for Winter* activity group meets monthly to knit or sew hats and scarves for Seattle’s homeless population.
 - *Planning for a Good Death* attracted 17 members and is meeting monthly.
 - A number of other informal groups based on member interests have periodic gatherings to listen to jazz or attend plays. These are member-initiated, typically, and are supported by our staff.
 - We also act as a clearinghouse to keep our members informed about local activities that may be of interest, such as community center movie nights or lectures on healthy aging.



Pods

- At the request of several members, we facilitated a set of activities at the local neighborhood level within the village by creating eight “pods” based on members’ specific geographic locations. This has helped create a stronger sense of “knowing one’s neighbors.”
- Members of the same pod have gathered together for in-home and restaurant dinners and happy hours; to watch political debates; and for purposes of discussions and trainings.

Need-driven Services

- Between our June opening and the present, about 20% of our members have been helped by each other or non-member volunteers with the following:
 - Air-conditioner installation
 - Home repair
 - Assistance with de-cluttering, packing, placing goods on Craig’s List
 - Use of technology (cell phones, computers, televisions)
 - Trips to medical appointments
 - Dog-walking
 - Health care advocacy in doctor’s offices and in the hospital
 - Referral to a variety of vendor-provided services from vendors recommended by our members



Healthcare Advocacy classes

- Our 5-session series of 2-hour classes in Healthcare Advocacy attracted a total of 25 people in the summer of 2015. We expect to repeat the series later in 2016.
- The initial class was by sponsored by Jewish Family Services, Iora Primary Healthcare, and Full Life Care and held at Jewish Family Services.
- We will be offering the series again in Fall/Winter of 2016-2017.
- Classes are free for our members and we charge \$50/session to others.

Other classes

- Yoga classes were offered to our members six Saturdays in 2015-2016 at the “under-market” rate of \$10/session.
- We began offering *The Practice of Health* classes to our members, with the collaboration of a local social worker and Iora in Fall 2015 and the series continued in 2016 at Aegis Living on Madison. This series of mind/body/heart/spirit classes has been a boon to a few of our members.

Finances and Fundraising

Our 2015 budget of \$213,427.26 was based on a more accelerated member recruitment and grant acquisition than has actually occurred. In response, we managed all expenditures closely so that they were in line with actual revenue. Our 2016 budget of \$125,790 is more realistic.

Wider Horizons currently has two staff members—an Executive Director and a Program Coordinator—as well as a contracted bookkeeper. We hired a skilled grant writer last year and, in collaboration with her firm, have applied for a number of grants.

We received \$129,520 from 2015 through the first quarter of 2016 from a combination of small grants, individual donors, and corporate sponsorships. Horizon House is our largest sponsor/funder, having provided \$50,000 in 2015 and \$25,000 in 2016 (with another \$25,000 expected if we can demonstrate an equal match). This is in line with its role in bringing Wider Horizons into existence through its leadership of a 4-year planning phase.

Networking and Outreach

We are playing well with others, including other local villages and villages across the country. We presented at the national Village to Village Network conference held in Seattle last fall. We’ve given several community presentations with our colleagues from other villages. And we have convened our two peer Executive Directors from NEST and PNA Village on several occasions. We have given technical assistance to other villages developing in Seattle and King County, both separately and through our involvement with Senior Services *Aging Your Way* work.



We continue to be plugged into the healthcare and social services network in the Seattle area. Typical activities were our presentations: 1) to a group of Providence/Swedish geriatric care providers at their monthly “lunch and learn” last September, and 2) to a group of the staff of the Iora Primary Care Clinic in May of 2016. In collaboration with Jewish Family Services (one of our trusted partners), we are presenting to consumer groups as well.

Observations and Lessons Learned

Wider Horizons, like most other villages, has experienced challenges in the areas of member recruitment and fundraising. Many people are unfamiliar with the village concept and need time to understand how it works. However, 79 exceeds the member total of many villages that have been operating for one or more years.

We have so far rejected a strategy—employed by other villages—of offering discounted “social” memberships as a revenue-builder, preferring to attract a cadre of Village Friends who may attend certain events and support us as volunteers and donors. Despite minimal marketing efforts, we have a half-dozen or so “Friends” (donors who give \$200 and may also attend our social activities).

Two overall learnings: 1) Everything is more complex and takes more time to accomplish than originally envisioned or planned; 2) Our founding members are well-rooted in community activism and that has given us a leg up over other villages that may emphasize social services over community-building.

What we've done especially well:

- Our policies and procedures in the area of vendor and volunteer vetting are excellent and have already been requested by other start-up villages, as has our Healthcare Advocacy course curriculum.
- Embracing a community-organizing model for membership recruitment and development has served us well and has resulted in a vibrant and active membership that is more interested at present in activities than in services.
- The idea of having all new members interviewed one-on-one by a member has proven wildly popular and given us a great deal of insight into what our members desire and want to contribute.
- While a continuing challenge, pushing leadership down from the top is something that has been ongoing and has resulted in a number of members moving forward to assume leadership. Four active members were elected to serve on our Board of Directors at the Board's June 2016 meeting.
- We have hosted two graduate students from the University of Washington's School of Social Work. One just completed a very successful two quarters and the other has just begun. This is fairly remarkable given our small size.

What we would like to do over, better:

- We could have managed expenditures more conservatively and seen our endeavor more as a small business start-up overall.
- We needed to be even clearer than we have been that we are not a social service agency. Particularly at start-up, we were not well-prepared to deliver services to members and we are still building efficient systems.
- We could have delayed opening until fall of 2015 and still kept our founding members happy.
- We applied for 501c3 status in early 2015, following advice. We should have applied in July of 2014 or soon thereafter because it somewhat delayed our receipt of grants from foundations.

The process of starting our village has been a hoot and we are excited to continue growing.

Thank you so much for your support.