

Aging at Home: For a Lucky Few, a Wish Come True

By Jane Gross

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BOSTON - ALONE in his row house on Beacon Hill, with four precipitous flights of stairs and icy cobblestones outside the front door, John Sears, 75, still managed to look after himself after he was hit by a taxicab and left with a broken knee.

That is because Mr. Sears was one phone call away from everything he needed to remain in his home, the goal of more than 80 percent of the nation's elderly as they confront advancing age, according to consistent polls.

Mr. Sears required both practical assistance and peace of mind: Transportation to and from the hospital. An advocate with him at medical appointments. Home-delivered meals from favorite restaurants. Someone at his side as he hobbled to the bank and the barber. Someone else to install grab bars in his bathroom. A way to summon help in an emergency. People to look in on him.

All these services were organized for Mr. Sears by Beacon Hill Village, an innovative nonprofit organization created by and for local residents determined to grow old in familiar surroundings, and to make that possible for others. Community-based models for aging in place designed by the people who use them are the wave of the future, experts say, an alternative to nursing homes and assisted living centers run by large service providers.

At Beacon Hill Village, members must pay dues and must live in either the storied Beacon Hill or Back Bay neighborhoods. Though the model would probably be more difficult to adapt to poorer communities, the organization is poised to show others how to do what it has done. And the offer of expertise comes as the first wave of baby boomers turns 60, many of them dismayed by their parents' long-term care options and anxious about their own.

"Let's hope we're spreading the seed of what could be a prototype," said Mr. Sears, a member of the Massachusetts House of Representatives in the 1960's and of the Boston City Council in the 70's and the loser, in 1982, to Michael S. Dukakis in the state's gubernatorial race. "Maybe once a decade somebody has an idea where you have to say, 'Why didn't someone do this sooner?'"

Beacon Hill Village originated with a dozen civic-minded residents of this neighborhood of 19th-century gas lamps, red brick sidewalks and ancient elms. They all wanted to remain at home, even after transportation and household chores became difficult or dangerous, the point at which many older people quit familiar surroundings. They also wanted to avoid dependence on adult children.

They were unwilling to be herded by developers into cookie-cutter senior housing and told what to do and when to do it by social workers half their age. They had no intention of giving up the Brahms Requiem at St. Paul's Chapel for a singalong at the old folks' home, or high tea at the Ritz-Carlton for lukewarm decaf in the "country kitchens" that are ubiquitous in retirement communities.

"I don't want a so-called expert determining how I should be treated or what should be available to me," said 72-year-old Susan McWhinney-Morse, one of the founders. "The thing I most cherish here is that it's we, the older people, who are creating our own universe."

Five years ago, Beacon Hill Village was a wish, not a plan.

Today, it has 340 members ages 52 to 98, an annual budget of \$300,000, an executive director and staff, a stable of established service providers and enough foundation support to subsidize moderate or low-income members, who number one-fifth of the total. The annual fee is \$550 for an individual and \$780 for a household, plus the additional cost of discounted "à la carte" services.

The grass-roots experiment here drew praise in a recent AARP publication, and has been hailed by an array of research institutes, including the AgeLab at M.I.T. and the North Carolina Center for Creative Retirement in Asheville, N.C. It has also been a hot topic at citizens' roundtables in a dozen communities as people met to discuss how to lead fulfilling lives in the retirement years.

Beacon Hill will publish a how-to manual next month, intended to guide others through the complexity of creating a business plan and surveying community needs. That manual will encourage imitations, according to Judy Goggin, a vice president at Civic Ventures, a research institute focusing on baby boomers and aging, which is helping set up the nationwide roundtables.

"This is a business model that could easily be replicated with subsidies from a city or county," Ms. Goggin said. "And once other communities realize that, even more of them will start to pay attention."

In the Beacon Hill model, membership dues cover weekly trips to the supermarket, rides from volunteers, group exercise classes and lectures on topics related to aging. Paid services -- including home repair or home health aides -- are generally discounted anywhere from 10 to 50 percent from the going rate.

Most valuable, many members say, is the comfort that comes from being one phone call away from familiar staff members who patiently talk them through problems. "We are more than a Rolodex," said J. Atwood Ives, a founding member, who is called Woody.

Beacon Hill Village sees a new source of revenue in helping others replicate what it has done. The manual will be priced at \$300 for nonprofits and neighborhood groups and \$500 for for-profits and municipalities. That income, along with \$1,200-a-day fees from

a new consulting service, will be plowed back into member services, said Judy Willett, executive director of Beacon Hill Village.

The manual will describe mistakes as well as successes. The biggest mistake, Ms. Willett and the board members agree, was a marketing strategy that failed to reckon with the fact that most old people do not want to admit they need help. Ms. Willett has 700 names in her file of prospective members who have all said they are "not ready yet."

"I call them the N.R.Y.'s," Ms. Willett said. "They still haven't fallen or been to the E.R. at Mass General."

To persuade the N.R.Y.'s, new promotional materials eliminated mention of age or infirmity, along with the phrase "virtual retirement community," and substituted the slogan "plan for tomorrow, live for today."

Even the founding members are vain about their own vitality. One, David B. Arnold Jr., 83, said the only Beacon Hill Village service he uses is a private trainer who keeps him limber for downhill skiing.

Mr. Arnold, like many of the founders, is a Harvard alumnus, a trustee of many cultural institutions in the city and a millionaire. After selling a technology business, he said he enjoyed the challenge of inventing something from scratch that would benefit his neighborhood. In that, he is like another founding member, Mr. Ives, 69, a semiretired investment advisor, who said that people with "passion, time, wisdom and wealth" had the responsibility to spearhead projects like this one.

The two men enlisted the help of Harvard Business School friends who give pro bono advice to nonprofit startups. They also had connections at Massachusetts General Hospital and arranged access, and timely appointments, for their members to an otherwise closed geriatric practice. They found foundations to subsidize memberships for 63 neighbors with annual incomes below \$45,000.

They also made sizable donations themselves during the costly trial-and-error startup. Even now, when almost half the organization's income of \$297,863, or \$132,863, comes from membership dues, board members, like Mr. Arnold and Mr. Ives, contributed more than \$100,000 last year, according to the 2005 annual report.

That raises the obvious question of whether a Beacon Hill Village is possible in less privileged communities. Some experts, like Ms. Goggin at Civic Ventures, say that municipalities or foundations could provide money. Others, like Jon Pynoos, a professor of gerontology at the University of Southern California, point to federal and state pilot programs in supporting the elderly at home.

The United States Administration on Aging, for example, is currently paying for service coordinators at 60 "naturally occurring retirement communities," or NORC's, neighborhoods or apartment buildings where many people have grown old together.

And a few state Medicaid programs are giving the elderly vouchers to buy home care services, when Medicaid has historically been limited to nursing homes.

The needs of Beacon Hill Villagers range from minimal to all-consuming.

Ruth Barclay, 85, welcomes a steadying hand on her elbow and help with her packages when she goes grocery shopping. Suzanne Stark, 80, who pays \$100 a year in membership because of her moderate income, called for help when she couldn't get her sick cat into the carrier for a trip to the vet. Dorothy Newell, 75, needs someone to water her plants because she can no longer lift the watering can. Miriam Huggard, 97, has an aide five days a week in her second-floor walk-up apartment; she is one of 15 members with full- or part-time help at home.

The cost of an aide, about \$25 an hour, would be prohibitive for many. On a case-by-case basis, Ms. Willett said, she can turn to a foundation to keep someone out of a nursing home. But as an organization, Beacon Hill Village made an early decision, for financial and legal reasons, not to own real estate or directly provide medical care. Thus, it has no homegrown solution for members who cannot stay at home.

Mr. Sears wants no part of the assisted living center in suburban Concord where his twin sister lives. But he cannot afford round-the-clock help should he need it, Mr. Sears said, describing himself as real-estate-rich and cash-poor. And his Acorn Street treasure, five stories high and one room deep, demands that he be mobile.

On his lap is a dinner tray -- ravioli and merlot brought in from a neighborhood bistro by a young Beacon Hill staff member. Mr. Sears sits in a scarred leather chair almost invisible behind stacks of yellow newspapers and towers of history books that reference his ancestors.

Mr. Sears can summon an ambulance and open the front door with the push of a button on his key fob, relieving the dread of days alone lying on the floor. Recently, he slept on the parlor couch a few nights rather than risking the stairs. But that is no long-term solution when the kitchen is one floor up and the bathroom one floor down.

Mr. Sears said everybody at Beacon Hill Village was concerned about him being alone. It helps that the "cane brigade," as some of the women call themselves, escort him to "little functions," Mr. Sears said. On this bitter night, Erin Lehman, Beacon Hill's 29-year-old program coordinator, not only brought dinner but also kept him company while he ate. So did Cynthia Scott, 65, a member who said she should have been at home with her husband, who had a cold, but was enjoying Mr. Sears's charming patter.

"Just look at the rough-looking mob here this evening," Mr. Sears said, with an exaggerated sweep of the hand toward his helpers. "There's always somebody around if I need them. This is a marvelous aid to older people, especially those of us who live alone."

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