



**ANNUAL REPORT**

**June 2009**

**Bethesda, Maryland 20817**

## Burning Tree Village Annual Report, 2007-2008

### Acknowledgements

This report was prepared by Odile Jennings, Secretary of Burning Tree Village, with assistance from Amy Rider, Leslie Kessler, and Harry Rosenberg.

### Burning Tree Village Board of Directors



From left to right (front row) Harry Rosenberg, Amy Rider, Wendy Williams, Odile Jennings, Nancy Aronson, Allan Williams (back row), Anne Golightly, Leslie Kessler (not shown) Jane Meleney Coe

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### Message from the President



This is the first annual report of Burning Tree Village (BTV). I want to thank everyone who has helped make our grass roots effort to help our neighbors age in place a success: our Board of Directors who have worked diligently and cooperatively; our neighbors who have encouraged us and given us their moral and financial support and have offered hours of support as volunteers; and Montgomery County which has encouraged us every step of the way and provided us with grants and services in kind. We are excited that BTV is operational, and we hope that the number of requests for assistance will increase as our neighbors view us as a trusted source to help them remain in our community as they age. To personalize our services, a BTV Board member visits each person who requests services for the first time. We acquaint them with our organization and services and help them fill out the application forms. We hope that our neighbors will come to feel that BTV is a real option for receiving some services as they age in our neighborhood. I encourage you to try us out. Call one of our Board members to get started (See Contact Information at the end of this report). This has been an exciting adventure, and there is more to come!

Leslie Kessler, President

**Introduction.** This Annual Report of Burning Tree Village is being sent to all of our neighbors, friends, and organizations as a summary of our efforts. Any suggestions and recommendations to improve our organization and enhance our services will be gratefully received by any member of our Board

Burning Tree Village is a new non-profit organization created primarily to provide support for our neighbors who want to remain in their homes as they grow older. There are no fees or dues, and the Village is based on the concept of neighbor helping neighbor.

## **Our Mission**

**Burning Tree Village (BTV) helps neighbors remain in their homes as they age (“age in place”). We do this through volunteer activities, educational and social programs, and through partnerships with other individuals and organizations that complement our volunteer activities. By engaging all residents in these activities, BTV enhances the quality of life of the entire community.**

The Village became operational in November, 2008, when we responded to our first request for assistance from an 81-year old widow with a variety of needs, including moving her trash cans on a regular basis, friendly visiting, and transportation to medical appointments. Filling this simple request represented the first successful delivery of our services. We have come a long way since we began almost two years ago.

**Beginnings.** At the urging of Odile Jennings, an exploratory committee of 11 neighbors met on April 20, 2007, at the home of Harry Rosenberg and Barbara Filner to discuss the Beacon Hill Village model and the possibilities of starting such a “village” in our Burning Tree area. We discussed the various services that might be needed to “age in place” and the feasibility of adapting an urban village model to our suburban area. Over the next few months, we designed a questionnaire to determine our neighbors’ needs and resources. With generous support of Montgomery County’s Commission on Aging, the questionnaire was mailed in October 2007 to the 441 houses in our immediate area (Burning Tree Valley, Cohasset, Maryknoll and Frenchman’s Creek). We evaluated the survey results and decided to proceed. Throughout the development process, the Bethesda-Chevy Chase Regional Services Center provided encouragement as well as material support in the form of a \$4,000 grant and photocopying services

**Organization.** A pro bono attorney, Julian Spierer and his assistant, Frank Riley of Spierer Law Firm, assisted us in preparing Articles of Incorporation, Bylaws, and a 501(c)3 application to obtain non-profit status. We were incorporated in the State of Maryland and granted charitable status by the U.S. Internal Revenue Service in February 2009 (based on our 2008 application), making all donations to BTV in 2008 and subsequently tax-deductible to the extent allowed by law. The name “Burning Tree Village” was selected for our organization and we agreed to “start small,” charge no membership fees, and use only volunteer services instead of having a paid executive director and high annual membership fees, particularly since our survey revealed a strong spirit of volunteerism in our neighborhood. We now have 25 volunteers offering a variety of services, and a total of 77 neighborhood Friends of Burning Tree Village. A number of donations were received. We also developed a logo, a promotional brochure, and separate forms for joining the organization, for volunteering, and for registering for services.

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The Steering Committee became a Board of Directors through the election of officers on June 3, 2008: President, Leslie Kessler; Vice President, Harry Rosenberg; Treasurer, Amy Rider; Secretary, Odile Jennings. The other board members are Nancy Aronson, Jane Meleney Coe, Barbara Filner, Allan Williams and Wendy Williams. An additional board member, Anne Golightly, was added on November 13, 2008. The bylaws and conflict of interest policy were adopted on July 29, 2008.

We decided that an existing non-profit organization called The Senior Connection will be used as a clearinghouse for three of our services, namely, transportation, grocery shopping, and friendly visiting. The Senior Connection also provided training for our volunteers in September, 2008, as well as Guidelines and liability insurance. The Guidelines developed for The Senior Connection were adapted for the Burning Tree Village.

**Services Offered.** They include transportation to medical or any other appointments, shopping assistance, friendly visiting, light home-based chores (such as changing lightbulbs, setting clocks, hanging pictures, simple mending or sewing, etc.), telephone check-in, putting out trash cans, helping with paperwork, computer assistance, pet care, indoor plant care, language translation. In addition, we distribute a weekly electronic newsletter, an annual paper copy of the publication "Neighborhood Services Exchange: Recommended Services," and information on resources provided by Montgomery County and others.

**Boundaries.** We chose to start with a small, well-defined area, and agreed in February 2008 to focus our services on the 441 households listed in the Neighborhood Directory edited by Jane Meleney Coe and distributed in 2006. (This Directory was revised and reissued in May, 2009.) These boundaries roughly include homes within the area encompassed by River Road, Wilson Lane, Maryknoll Avenue, Beech Tree Road and their offshoots. We agreed later to extend our services to persons living in contiguous neighborhoods, on a case-by-case basis. We also broadened the definition of the target population to include those with disabilities.

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**Launch.** The kick-off took place at a wine & cheese social event held at the River Road Unitarian Universalist Congregation on July 20, 2008, with a second social on July 22 at Leslie Kessler's house. A presentation was made, and packets containing applications to join, applications to volunteer and requests for services were handed out. A total of about 70 neighbors attended these two events, which were deemed successful based on attendance and enthusiastic remarks by participants.

Launch at Unitarian Universalist Congregation

**Promotion Activities.** Promoting our village is ongoing. We have completed several house-to-house distributions of brochures, flyers, and announcements. In addition, beginning in November 2008, we initiated small social gatherings on a block-by-block basis to spread the news that we were in business. At these block parties, one or more Board members made a brief presentation and responded to questions. To date, we have had over a dozen of these informational social gatherings.

We have experienced a lower than expected level of requests for assistance thus far. The culture of "self-reliance" in which we live may foster a reluctance to ask for help, and we understand that it may take some time before our Village becomes fully functional. We are also aware that neighbors or relatives sometimes informally and effectively provide assistance to those who need it.

**Web Site.** Richard Fong volunteered to develop our website and has made tremendous progress: a draft version of the website is online at [www.BurningTreeVillage.org](http://www.BurningTreeVillage.org)

**Technical Assistance.** As the first "village" in Montgomery County, we are very willing to share our experience and promote the village concept. We have responded to queries from other neighborhoods, and have made presentations to a number of other communities, including upper Bannockburn, lower Bannockburn, Somerset, Carderock Springs, Chevy Chase, Kenwood Park, Cabin John, Fleming Park, Kenwood Manor, Oldchester-Maiden Lane, and Fallsmeade.

**Current Activities.** Various committees have been set up: a Programs Committee, to organize social events for the neighborhood, (such as educational events, coffees, neighborhood walks and walking partners, restaurant outings, organized trips, etc.), and a Village Outreach Committee to personally visit those who request services for the first time. A Neighborhood Services Exchange Service Recommendations publication was



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issued in winter 2008, and a new Directory of the Burning Tree Village area was completed and delivered to each household in May 2009. We are also planning a medical component to our services, which might eventually include doctor and nurse practitioner home visits, health screenings, and wellness and educational programs. Further, through the Village, regularly scheduled rides to and from the public library are being offered by one of our volunteers.

**In Memoriam:** Burning Tree Village regrets the passing in late February 2009 of one of our founding board members, Barbara Filner. Barbara's vision for BTV, along with her dedication, perseverance, and attention to detail carried the creation of BTV from being a gathering of interested neighbors to becoming a non-profit corporation recognized by the IRS. Burning Tree Village has lost a champion, and we have lost a dear friend.

In Barbara's honor, we established the Annual Burning Tree Village Barbara Filner Memorial Walk. The first Walk was a great success. It took place on May 25, 2009, and over 50 neighbors joined together for walking, talking, connecting with one another, and, of course, bagels.



First Barbara Filner Memorial Walk, June 2009



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**Financial Statement**

**Financial Statement as of December 31, 2008**

<b>Balance Sheet</b>		
As of December 31, 2008		
	<b>Current Assets</b>	
	Checking/Savings	
	PNC	
	checking	3,838.32
	Total	
	Checking/Savings	3,838.32
	<b>Total Current Assets</b>	<b>3,838.32</b>
<b>TOTAL ASSETS</b>		<b>3,838.32</b>
<b>LIABILITIES &amp; EQUITY</b>		
	<b>Equity</b>	
	Net Income	3,838.32
	Total Equity	3,838.32
<b>TOTAL LIABILITIES &amp; EQUITY</b>		<b>3,838.32</b>

<b>Profit and Loss</b>		Jan - Dec 08
<b>Ordinary Income/Expense</b>		
<b>Income</b>		
	Nonprofit Organization	
	Grants	658.53
	Gifts in Kind - Goods & Service	540.00
	Individ, Business	
	Contributions	4,918.00
	<b>Total Income</b>	<b>6,116.53</b>
<b>Expense</b>		
<b>Operations</b>		
	Business	
	Registration Fees	514.00
	Accounting Fees	0.00
	Logo Design	300.00
	Cost of in Kind	
	Copying	540.00
	Computer	0.00
	Parking	3.50
	Postage, Mailing	
	Service	94.55
	Printing and	
	Copying	4.59
	Supplies	413.62
	Telephone,	
	Telecommunications	0.00
	Website Registration	36.36
	<b>Total Operations</b>	<b>1,906.62</b>
<b>Program Expense</b>		
	Kickoff	371.59
	Seminar & Training	0.00
	Social	0.00
	<b>Total Program Expense</b>	<b>371.59</b>
	<b>Total Expense</b>	<b>2,278.21</b>
<b>Net Income</b>		<b>3,838.32</b>

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**Contributors.** We wish to recognize those who have donated funds in support of our goals. This lists all donors since the beginning of our organization up to May 1, 2009. Burning Tree Village is a 501(c)3 public charity and donations are tax deductible to the extent allowed by the law.

### GOOD NEIGHBOR Up to \$99

Anonymous (7)  
Nancy Aronson  
Bob and Jane Coe  
Shari Gelman  
Odile Jennings

Leslie Kessler  
Arthur Levan  
Amy Rider  
Ruth Robinson  
Harry Rosenberg

Gerald & Marsha Scheinman  
Elizabeth Smith  
Darlein Stein  
Allan & Wendy Williams

### SUPPORTER \$100-499

Anonymous (4)  
Elizabeth & Kyle Barbehenn  
Debbie Bloom  
Bonnie Broh-Kahn  
Shoke-Hwee Cua  
Steven & Patricia Georgilakis

Gerald & Alba Hanson  
Ellen Kreimann  
Edward Kushner  
Elizabeth Oppenheim  
Burton S Oranburg  
Ruth H Potter

Barrie and Marilyn Ripin  
Steve & Lori Ross  
Ludwig Rudel  
Charles & Margaret Saunders  
Heather Tuck

### SUSTAINER \$500-999

### FOUNDER \$1,000 and over

Lawrence Lepler&Pia  
Casarino Lepler  
Reynaldo & Lola Maduro

We also acknowledge Fox Hill Senior Condominiums of Bethesda, which has generously provided services and encouragement to Burning Tree Village.

### Contact Information

#### BURNING TREE VILLAGE, Inc.

#### BOARD OF DIRECTORS

President, Leslie Kessler, Deep Creek Court, tel. 301-526-2251  
Vice President, Harry Rosenberg, Richard Drive, 301-229-4406  
Secretary, Odile Jennings, Beech Tree Road, 301-229-5232  
Treasurer, Amy Rider, Beech Tree Road, 301-365-0839  
Nancy Aronson, Winterberry Place, 301-229-9239  
Jane Meleney Coe, Pawtucket Road, 301-320-5083  
Anne Golightly, Winterberry Lane, 301-229-2646  
Allan Williams, Beech Tree Road, 301-365-2317  
Wendy Williams, Beech Tree Road, 301-365-2317

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WEBSITE

[www.BurningTreeVillage.org](http://www.BurningTreeVillage.org)

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