



## **Institutional affiliation and administration:**

- ✓ Stonewall Bridge engaged and partnered with Stonewall Community Development Corp (501 c 3)
- ✓ Conducted ongoing briefing sessions for SCDC board members on the model
- ✓ SCDC Board prioritizes Stonewall Bridge as its lead strategic priority and expands Board to support it
- ✓ Added The Stonewall Bridge onto SCDC website, with detailed links to survey, program descriptions, and research results.

## **Expert recruitment and engagement:**

- ✓ Convened 100+ stakeholders, experts and interested parties, including SCDC board, advisors, and TD bank roundtables
- ✓ With TD Bank, convened and led three national roundtables to engage 30 national experts in housing, finance, estate planning, and home and senior care
- ✓ Assigned those interested to project teams, secured commitments for assistance
- ✓ Engaged Director, National Center on Elder Abuse to assist in sharegiver screening
- ✓ Meetings with LGBT senior fraud expert attorneys on fraud prevention protocols and fiduciary role

## **Caregiving model development:**

- ✓ Selected and convened senior care expert team
- ✓ Conducted online and in person meetings with team, completing:
  - ✓ Scope of sharegiver role
  - ✓ Position description and scope qualifications
  - ✓ Management/ oversight system for sharegivers
  - ✓ Recruitment, screening and selection criteria in cooperation with end users
- ✓ Creating caregiving template and manual for pilot site and scale-up
- ✓ Engaged Director of National Center on Elder Abuse and USC Medical School for research to assess and screen sharegivers

## **Technology systems:**

- ✓ Identified and met with senior care monitoring company
- ✓ Recruited interested seniors, completed on site demonstration
- ✓ Held senior field trip in pilot community to see home monitoring system
- ✓ Installed and activated first home safety system in Asheville test site
- ✓ Trained seniors and staff in its ongoing use to promote senior well being

## **Pilot site:**

- ✓ Conducted five introductory seminars, 11 private meetings, with 26 seniors
- ✓ Conducted two online surveys (introductory and needs assessment)
- ✓ Held individual meetings with several interested seniors to identify early adopters open to use home monitoring system, consider home equity commitments
- ✓ Several residents have indicated willingness to donate homes or home equity
- ✓ Identified local expertise in senior care, property management and financial resources

- ✓ Recruited local nursing oversight

## **Research:**

- ✓ Launch national online survey on Stonewall Village platform
- ✓ Ongoing results of national survey made available to public
- ✓ Recruited, led and analyzed several senior focus groups
- ✓ Completed first millennial focus group to test model
- ✓ Ongoing development of templates and policies
- ✓ Plan community-based outcomes research
- ✓ Began to integrate technology and sharegiver service model across SCDC system of affordable housing

## **Legal/corporate:**

- ✓ Retained leading national non-profit attorney to design structure for national scale-up of TSB entities, allowing interstate activities and property holding
- ✓ Applied for trademark protection
- ✓ Convened estate planning experts for advice on home donation and annuitization
- ✓ Creating legal/corporate templates and manual to facilitate national scale-up
- ✓ Collaborating with SCDC's parent organization to structure multi-state operations