“How Do We Start?” A Guide for the Exploration Phase of Village Formation

1. Identify a “group of individuals in your community who share your vision of creating a Village within your community.” Determine how you will attract Volunteers initially—both to your core planning group and later to teams to assist with village development tasks.

(A) Village Volunteers can be found by:

- Getting together groups of neighbors at informal gatherings to discuss the idea of a Village and people’s interest in “aging in community."
- Conducting focus groups in your community of interested seniors, their adult children, and potential Village partners
- Holding parlor meetings/presentations/town hall meetings/open houses at your local library or community center. Invite residents, local press, community leaders, partners
- Speaking to faith-based communities and other organizations with seniors within your service area
- Getting media coverage/stories
- Flyers, posters, website—marketing in your area

(B) Target individuals with the following qualities for your planning group:

- Residents of the proposed Village service area who have a commitment and passion to stay in their homes/community.
- Visionary risk-takers and entrepreneurs
- People who are known and respected in the local community
- People who are good at networking and have lots of connections within your service area
- People with these skills & expertise: leadership, finances, fundraising, recruiting & managing volunteers, organizational development, marketing & publicity, event planning, social media, database management
- People who are organized, good planners & recordkeepers
- People with considerable time to devote to this project
- Hard workers (not just people who want to weigh in with their opinions)
2. **Coalesce a planning group.**
   - Establish group’s organizational structure, meeting schedule & decision making process.
   - Find a sufficiently large home/place to meet regularly
   - Get members’ long-term commitments to the establishment of a Village (2-5 years!). They must have ownership of this process (“If it’s going to be, it’s up to us to make it happen”)
   - Select a chair/leader
   - Identify other tasks that need to be done & assign to group members
   - Establish a working timeline and system of accountability/follow through
   - Make sure you have sufficient members with the correct skills to handle the work that needs to be done. Continually recruit new members until you do.
   - Make sure planning group members are residents of your proposed service area
   - Could your planning group evolve into the Village’ governing council/board? If not, be aware you will need to recruit members for that function down the road

3. **Identify your Village’s target population(s)**
   - Intergenerational – includes ALL neighbors
   - Only seniors – by age? Income?
   - Other

4. **Research. Assemble census & other demographic data, including:**
   - Total population of proposed service area
   - Population aged 65+
   - Population aged 50-64
   - Number of residents living alone
   - Number of owner occupied homes
   - Number of renters
   - Median & average home prices
   - Average income of area residents
   - Is area increasing/decreasing in # of senior residents?
5. Define your geographic area to be served and decide if there is sufficient core group of the appropriate age to move ahead with the Village in the service area you have planned or if it needs to be changed.

6. Decide on your Village’s goals. What are you trying to accomplish/make possible by creating a Village in your area? Why is this needed and important?

7. Develop a working mission statement for your Village.

8. Develop a list of the Values that you will operate by.

9. Develop a list of the kinds of volunteer help you will need in the exploration and development phases.

10. Create a community profile: ethnicity, socio-economic levels, age distribution for your service area, community resources.

11. Decide on the proposed operational model of your Village

(a) All Volunteer Model (no paid staff)

- Need very strong and committed volunteer leadership team
- Need highly organized, available and committed group of volunteers
- Need MORE volunteers than the paid staff model
- Operating costs are lower and membership fees are lower
- Growth is more rapid. Will probably need to put people on waiting list/hold down membership to meet the number of volunteers.
- The village can afford to be generous in waiving membership fees
- Members tend to be older since there is no pressure/reason to recruit members who don’t need services
- Focus tends to be on delivering services, rather than on social and educational programs
- Long-term sustainability is a worry.
- Being able to guarantee services is a worry.
- It is difficult to transition from a volunteer to a paid staff model if you need to later on
• The governing council will need to be very engaged in the day-to-day operations of the Village

(b) Paid Staff (with volunteers)

• You will need to decide about function and responsibilities of the staff
• You will need to decide about how much staff time will be needed at each stage of development
• Tighter structure of accountability than all volunteer
• Tends to be better organized than all volunteer
• Tends to offer a greater scope of programs and services
• Programs and social activities are as important as services, especially to younger members
• Governing council does not need to be engaged in day-to-day operations
• You have professional leadership
• Having paid staff substantially increases the costs of operating, requires an office
• Fundraising will be needed. Dues typically cover at most 60-80% of costs. Fundraising activities will consume staff and volunteer time.
• Encourages having social memberships as well as service-receiving ones.
• Thought to be a more sustainable model long term

12. **Decide whether your Village will be**

• A stand-alone 501c3
• Sponsored (a program of an existing nonprofit)
• Part of an area hub & spoke
• Able to convince an existing Village to expand to your area

13. **Decide on a working name for the Village**
14. **Decide on the range of possible programs and services you will want your Village to offer, which may include:** Transportation; shopping/errands; handyman services; friendly visits; assistance with computers & technology; meal preparation; grocery shopping; assistance with mail, forms, checkbook; dog-walking & pet care; yardwork and gardening; accompanying to medical appointments; daily check-in calls; social activities; educational programs; fitness activities; other. (See UC Berkeley list of categories at end)

15. **Consider conducting a short needs assessment (survey) of your community** to determine if there is sufficient community interest and to begin identifying the services to be provided based on needs in community. Explore local community partner(s) to assist with sponsorship and distribution.

16. **Funding & Financial**

- Identify operating expenses (i.e. rent, salaries, liability Insurance, marketing, program costs, database) and develop a preliminary 1-3 year operating budget (so can figure out what membership fees will need to be and how much you will need to fundraise)
- Figure out where you will find and how much you need: (a) seed money and (b) one year operating reserve. Possible sources: large donors, foundations, charter members, planning group/leadership team
- Identify grants or sponsorships that might be obtained from local organizations, county, or community partners such as: local churches, hospitals, businesses
- See if you can find a short-term or ongoing fiscal sponsor to allow you to offer tax-deductible donations
- Decide on your membership structure and proposed membership fees
- Decide if you will have a subsidized membership program and how you will fund this
- Will your community/service area support fundraising events such as auctions, galas and so on?
- Is there an agency that is the impetus for forming the Village that will provide resources? If so, what are they?

17. **Volunteers**—are there sufficient volunteers of appropriate ages in your service area to provide the services you need? Identify places you could recruit volunteers from, how you will track volunteer work and reward volunteers.

18. **Search out other Village programs in your area/state.** Visit/talk with their leaders. Find out what resources they have to share.
19. **Explore potential local community partners** (npos, hospitals, ccrcs) and identify how you might work together.

20. **Identify the competition in your area.** Who, if anyone, is already delivering comparable services? What are their rates/fees? Who is eligible to receive their services? How could you partner with them or improve on their offerings? Where are there gaps?

21. **Decide how you will develop and maintain a database** of information on interested people, potential members, volunteers, service providers, partners, etc.

22. **Review decisions & achievements to date, including:**
   - Have a strong, committed and sufficiently large planning group
   - Decided on a Village name
   - Decided on working boundaries
   - Selected Village operational model (volunteer, paid staff)
   - Selected organizational structure (stand alone, hub & spoke, program of a nonprofit)
   - Identified targeted population
   - Have established there is sufficient interest & population in this area to support a Village
   - Have established funding needs, operating budget, proposed membership fee structure.
   - Joined V-t-V network (either on your own or through hub/fiscal sponsor)
   - Have raised some seed money to use for initial expenses.
   - Have found venues for and created collaterals to use at presentations

23. **Move into DEVELOPMENT Phase**
APPENDIX: UC Berkeley Services Categories

DRIVING/TRANSPORTATION
COMPANIONSHIP
GARDENING / YARD CARE
HOUSEKEEPING
LEGAL ASSISTANCE
GROCERY / MEAL DELIVERY
HOME REPAIR/ MAINTENANCE/ MODIFICATION
FINANCIAL ADVOCACY/ ASSISTANCE
HEALTH CARE ADVOCACY/ ASSISTANCE
PET CARE
TECHNOLOGY ASSISTANCE
CLASSES ATTENDED
SOCIAL EVENTS
FITNESS
HOUSING
OTHER SERVICES
MISC INFORMATION
REFERRALS TO PREFERRED PROVIDERS