

# Exploratory/planning

## Committee work:

This chapter will cover the various aspects of the planning committee's work prior to launch. As stated in chapter two, this work may take 2-3 years. Even though these tasks are outlined one after the other in this text, it is not a rigid process and your planning group may want to organize its work differently.

### 1. Develop a Mission Statement

Developing a mission statement for your village is one of the important early tasks your leadership group undertakes. The mission statement sets the tone for your village, and it is often one of the first sentences visitors to your website read.

The Mission Statement offers the vision for establishing whom you hope to serve, and how. An example of a mission statement: "The purpose of Friendly Village is to support the lifestyle needs of the residents of the village in order to allow residents the choice of continuing to live in their current home and community while sustaining an acceptable quality of life".

Some villages tend to use a statement of purpose, rather than a mission statement: Example: "We are a non-profit, volunteer-driven organization for Chevy Chase seniors to keep us connected and active in our community as we age in place" [Chevy Chase @ Home]. Look at the mission or purpose statements on a few village websites as

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you go through the process of determining what best suits your situation.

## **2. Do you have everyone you need at the table?**

It has already been said that developing a village is not a one-person job. Whether your effort begins as neighbors talking informally or one individual who has articulated the vision, a working group needs to be established. Early organizational meetings deal with a wide range of issues, group organization, group leadership and defining and assigning leadership roles. You may wish to refer to this initial leadership group an “Exploratory Committee or Group” to make it clear that you have not reached specific decisions but are looking at alternatives as you become educated about villages. Your early leadership team should be willing to commit the time and energy to the creation of your village for approximately 3-5 years. The qualities you want in your exploratory group have been delineated in Chapter 2: Getting Started.

### **Qualities helpful to your leadership team:**

- i. Dedicated to the village concept
- ii. Team players: People with an ability to work well with others who may have differing views and personalities.
- iii. Contacts: the leadership will need to approach organizations, community groups and members of the community to ask for help, money, and support. Knowing a wide range of people within the community is helpful, being respected member of the community is essential
- iv. Nonprofit and/or professional expertise: It will be very helpful to have members of your leadership team who represent some of the following areas of expertise:
  - 1. Financial/accounting
  - 2. Legal
  - 3. Fundraising
  - 4. Management experience in other nonprofit organizations
  - 5. Experience managing volunteers Experience with aging and the elderly

Initial leadership of an Exploratory Committee tends to be self-selected, often from among those who attended the first meeting. If you are fortunate, you have a wide range of abilities and skills represented in this early group. But you also should discuss accountability among the group members who volunteer to take responsibility for, or the lead on, specific activities. Developing and maintaining a timeline which designates tasks, responsible persons, deadlines and actions, and updating and distributing such a timeline before each committee meeting may go a long way to identify early on whether you have the right person for a particular task or need to make an adjustment.

### **3. Define the geographic area**

Another early task is to determine the geographic boundaries of your village. You want to be clear in any communication to prospective village participants that they are eligible to participate by virtue of living within these boundaries. You can always expand the boundaries at a later date but may wish to focus initially on existing community or political subdivisions. If several subdivisions together form a village, be sure to engage any neighborhood or homeowner association early in your discussions, as they can be helpful allies in many aspects of developing a village. These associations generally follow subdivision boundaries and may have useful demographic and other data about the communities you are targeting. They may also have communication channels you can tap into to get the word out, like neighborhood association newsletters, websites or listservs.

### **4. Name your Village**

Once you have determined your boundaries, contact your local Planning Department to request a map of your targeted area and put the name of your village on it. A map of your planned village boundaries can serve as a powerful visual aid at meetings to introduce the village concept. If such maps are not available from your county, they might be available from a realtor's office.

One developing village used a large county-produced map as a focal point at its introductory community meeting. The map had a different color for the two subdivisions involved. It was laminated and hung on an easel at the entrance to the meeting-room. Attendees were asked to put a dot at their address, which naturally led people to begin talking to each other about their neighborhoods as they located and “dotted” their homes on the map]

## **5. Define alternative characteristics of Villages**

As we revise this document, some communities are organizing around characteristics other than neighborhood, such as religious affiliation, ethnicity or cultural affinity. Collect data on your target community and try to get as detailed population demographics as are available from public sources. Begin your data gathering by first checking with various groups what information already might be available. Has the neighborhood association already done any surveys?

You do not necessarily need extensive age demographic data early in your village development. It might be enough to get a handle on the age distribution for your zip code, which can be obtained via (insert website and links). You can verify age groups and the size of each cohort within your specific boundaries through the needs assessment survey that each village is encouraged to conduct.

If you want additional information about streets and homeowners in your neighborhoods, you can access the state assessment data which are available in many states. One village made a list of all the streets (25) in its two subdivisions and then compiled information by street, arranged in alphabetical and house numerical order, for use in developing its block coordinator system. It allowed easy tracking of door-to-door leaf-let distribution efforts and dissemination of information.

Do an inventory of how other neighborhood entities can assist you in disseminating information about what you are trying to do. What

communication channels are there already in the area, like newsletters, websites or listservs?

## **6. Define target population**

Making a decision about the profile of the group your village intends to serve will influence your programming and goals. There are several options for your Exploratory Committee to consider. Your village can choose to be inter-generational and include all neighbors living in your targeted neighborhood. Or you may decide to serve a senior audience. If you decide that your village mission is to serve a senior audience you must define senior either by age, ability or both. Deciding on your target audience will affect everything else you do.

By including younger families, you may find your prospective volunteer base expanding and younger neighbors committing to the concept of “aging in place”. Older persons without close family nearby may be willing to volunteer as parent helpers. Younger participants may be engaged as volunteers on technical communications issues that might be needed by older residents, or on tasks like website design and maintenance that benefits the village. Teen-agers may be glad to perform certain volunteer tasks as part of community service requirements in their schools, as long as you know the rules governing such service.

## **7. Form committees or subgroups to divide the work**

Prior to introducing the village development in an initial community meeting, you may find it helpful to develop subgroups or committees, to get tasks done. Initial committees might include:

- Community survey;
- Communications which can include newsletter, website and listservs;
- Social activities;

- Legal Issues, like incorporation and tax-exempt status application, if you decide early on to choose this model;
- Governance;
- Fund-raising;
- Finance and Budgeting;
- Marketing;

Once you have the secured wider community buy-in after the introductory community meeting, you can add additional working groups.

### **8. Get the word out**

Once your Exploratory Committee has developed its mission statement, defined the geographical area and the target population, selected a name and a logo and collected sufficient data on the neighborhood, it is time to get the word out to gauge the broader interest in a village for your area. Begin to plan an introductory community meeting at which the village concept will be explained, questions answered and where attendees will have the opportunity to hear participants from well-functioning villages talk about their experiences – the good, as well as what they might have done differently with hindsight.

Disseminate a “save-the-date” flyer which has brief information about developing a village in your community, provide a link to a website [another village website or the WAVE site, for example] from which they can learn more, and a contact email or other address. This is likely the first information most residents will receive about these plans, although they may have seen stories in the media about local villages. Responses to this introductory flyer will constitute your early list of participants who want to be kept informed of your plans and whose names and contact information you should enter into a database. You are unlikely to wish to establish your own website or take other steps until after your community meeting, when you would have a sense of sufficient buy-in and interest to move ahead.

Your County or town may have a designated village coordinator who can assist in getting word out in various ways. Citizen associations may also have resources like block-workers who can help disseminate information house-to-house – an important dissemination method until you have your own distribution list or your own village block-workers. And you can place a flyer in public places like libraries, store bulletin boards, and other places, as well as send articles to local newspapers.

**9. Your First Community Meeting:**

- develop the agenda;
- determine which committees or subgroups to introduce, to recruit participants;
- set a date at least 6-8 weeks ahead;
- select a time and location that maximizes the number of persons who would come;
- secure meeting space, ideally with adequate parking;
- invite guest speakers from functioning villages;
- decide on refreshments and other logistics;

Click for a sample invitations, timetable, 1st meeting planner, and other helpful documents.

Three to four weeks before the meeting, disseminate another flyer with information about the program agenda, map of location, directions and contact person for offering rides to individuals.

## 10. Develop a Contact database

The database which initially is used primarily for communication purposes can be maintained in electronically for ease of sorting, for a variety of purposes. Initial fields might include;

- first and last name (you need to decide if you are going to list all persons in a household as individual “records”);
- email address;
- street address (suggest one field with the following order (street, followed by house number, as in Anystreet 1234), which allows sorting by alphabetical street and the homes in numerical order. This may not apply to where there are multiple housing units, apartments etc.);
- home phone number; and a designation which phone is preferred
- cell phone number or other preferred contact number;

Additional fields depend on what information you wish to capture. One village added columns for whether or not the initial survey had been returned; whether the individual wanted to help develop the village, committees they had signed up for, and a general comment field in which special information was noted. This data base may be expanded as the village becomes operational, to include volunteer roles, member designations, or other data which a functioning village needs to maintain. Local village consortia may also offer more extensive data bases which may serve far more functions than solely to track initial contact data.

**Data use and confidentiality:** the personal information in this database should be kept confidential and participants should understand that their contact will not be shared for marketing or any other non-village use.



## **11. The Community Needs Assessment survey**

A needs assessment is important to determine the interest of your community residents in being a part of a village. It will help identify the programs they would like to see implemented and assist the leadership to establish a scope of services to offer. The survey results will allow your village leadership to plan for and judge when you are ready to become operational and deliver on your promises.

Village needs assessment surveys range from one to several pages in length. A small subgroup of your Exploratory Committee should review sample surveys and select content that allows you to select questions that you might offer in a particular village model (see Chapter4). You might also benefit from pilot testing the survey with 10 randomly selected participants from those who want your introductory list. Explain why you are pre-testing the survey and ask for their comments on both content and the process of completing and returning the survey.

It should be noted that some developing villages starting very small, perhaps primarily with social activities, use very simple surveys, asking a few questions about program preferences and hand their surveys out at neighborhood functions. Each method has its place depending on the scope and timing of your village development.

Understanding the depth and scope of preferred services will impact budgeting, neighborhood volunteerism, outside community resource support, strategic partnerships, and scope of government assistance.

If your local government has a village liaison or staff member who supports “Aging in Place” initiatives, this individual may also be a resource. They can advise your group in developing the neighborhood assessment document. They can also aid in having the returned assessments analyzed. It will be up to the leadership group to promote and publicize the needs assessment, to alert residents to expect to receive the assessment and to explain to residents the importance of completing the assessment and returning it. It is important to get a strong response to the needs assessment and this may

be the first test of the leadership's skills and commitment to getting the job done.

Once your group has consensus on content and dissemination methods, dissemination of the survey questionnaire can take many forms and may include multiple dissemination methods:

Launch it at your first community meeting;

Post it on your neighborhood association website or sent via email on listservs or in newsletters;

Hand-deliver a copy to each household in your neighborhood; this will ensure that each household receives a copy, in particular those who may not use Internet or email.

One village received not only completed surveys, but thoughtful thank-you letters and personal stories why the recipients welcome this development.

Develop a village model that suits your community (data collected and feedback from community) See chapter 4.

Your survey will, in most cases, provide a wealth of information to guide your next steps. Use this information to help you identify others who will help develop your village or to serve as future volunteers to provide services.

## **12. Assess need for “seed money”/ in kind contributions**

Early in your Exploratory Committee work you will find that expenses may crop up, whether they are for copying, printing, website or newsletter hosting, or filing for incorporation or 501(c)(3) designation. We recommend that a Finance/Budgeting Committee be established to identify anticipated expenses and ways to meet the need.

There are many ways to get seed-money before you can offer tax-deductions for any contributions received. Local businesses may be willing to provide in-kind goods or services, like refreshments or printing costs.

Local institutions often have community outreach programs that might be tapped for small expenses. Exploratory Committee members in many instances foot the initial costs of expenses and many villages ask for contributions at their meetings. Some revert to common fund-raising methods like bake-sales, lotteries or fund-raisers at which a portion of the proceeds go to village development. If a tax-exempt status is obtained, a village can solicit donations and creatively ask that residents financially support their village. Once a village is operational, depending on the model it has chosen, finance, budgeting and fund-raising need to be considered entirely differently.

### **13. Find a Home**

It is helpful, though not essential, to find a place that your village can call home. If your community has a clubhouse with meeting space, that is ideal. For communities with no internal community meeting space, you may find a local church or synagogue or mosque willing to host your village meetings. Other meeting options are: local libraries and schools; businesses, such as banks, restaurants, or health facilities with conference rooms or meeting spaces, or perhaps local government buildings and of course members' homes.

### **14. Build a Community**

While you are working on the more formal organizational steps, remember that you are building a community. Many villages choose to begin this process by offering social events long before they formally provide services on request. As shown in some of the village profiles in Chapter 5, several villages spent a year encouraging social interactions among neighbors through various interest groups, such as book clubs, walking groups, and other activities. As neighbors begin to interact around shared interests and get to know one another, participants gain the trust necessary to both request services from the village and serve as its volunteers. The sense of community