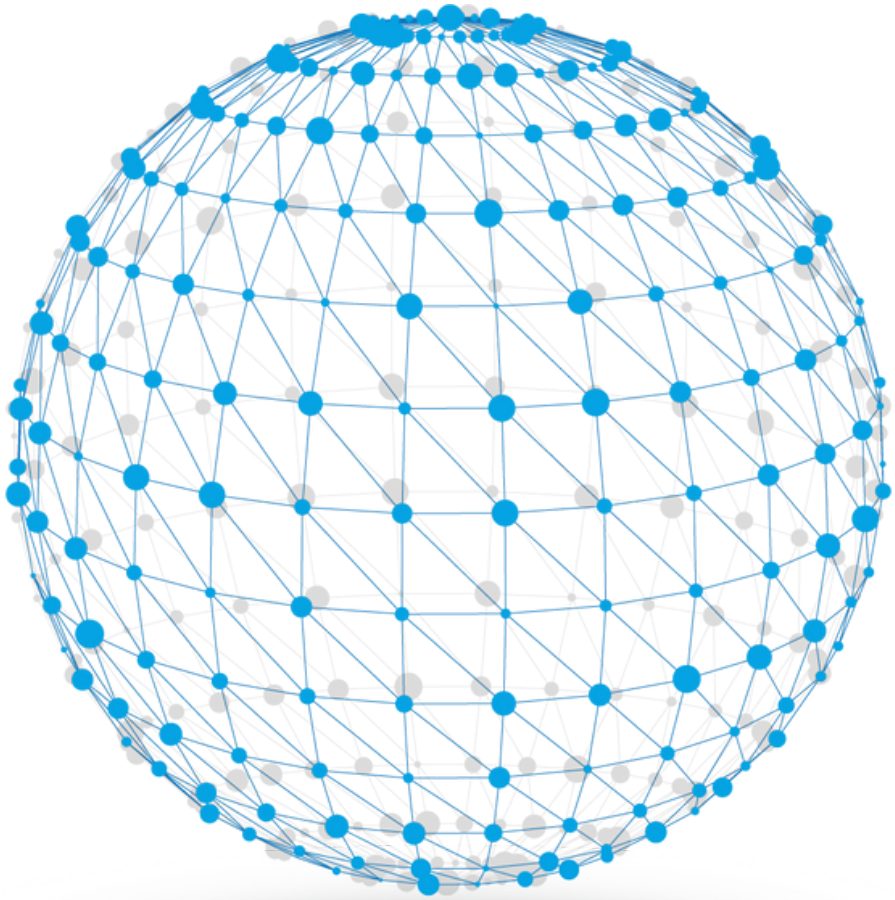
UPLIFT Florida Network:
The Journey to Date
2020–2023



As people live longer, wide-reaching movements and networks across the globe are helping them achieve their aspirations for healthy, active, and engaged living.

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UPLIFT Florida Network's Docuseries
Scan the QR code to glimpse experiences from UPLIFT's leadership team and more. Hear them narrate the journey to creating the organization and their aspirations for the future.

EXECUTIVE SUMMARY

As people live longer, wide-reaching movements and networks across the globe are helping them achieve their aspirations for healthy, active, and engaged living.

Capitalizing on its experience and work in healthy aging, in 2020, The Patterson Foundation (TPF) began incubating and providing facilitation, knowledge, and strategic and tactical expertise to develop a Sarasota Village – an idea put forward by TPF consultant Deborah Gauvreau and supported by a group of interested volunteers.

Villages are formalized networks of individuals that form communities supporting individuals in their desire to age in their homes. Villages differ from "The Villages," a census-designated master-planned age-restricted community in Sumter County, Florida. As community-based organizations, villages are not dependent upon location or physical structures.

With over 44% of Sarasota County's population being 60 or older, Sarasota was an ideal location to form a village. As that aspiration evolved, the Sarasota Village Exploratory Team identified an overarching need to create a regional hub organization providing administrative and operational functions supporting villages. To capture the findings, learnings, and reflections of the past three years, TPF has invested in creating a 2023 UPLIFT Impact Report. This comprehensive narrative explores the following:

- The aging landscape and ecosystems nationally and in Florida.
- The village model as an approach to support older adults aging in place and community.
- The development and evolution of UPLIFT.
- UPLIFT's aspirations for the future as it charts a path forward.

THE VILLAGE MODEL'S ROLE IN THE AGING LANDSCAPE

Our nation's rapidly growing aging demographic fuels a significant economic and social shift. According to the PRB, a nonpartisan research organization, the 2020 Census Bureau estimates over 55 million Americans are 65 or older, with one-fourth of those older Americans living in California, Florida, and Texas.

As people try to live independently as they age, they experience various obstacles related to poverty, daily living activities, and health and social services. COVID has contributed to and revealed the additional challenges of isolation among community members, especially older adults. Ongoing conversations exist on effectively preparing for the current and future population of older adults and addressing their challenges.

With Florida's larger, rapidly aging population, any trends and needs that emerge in the aging community will happen here first. Now is the time to seize the opportunity to develop forward-thinking models of care that promote health and well-being and prevent illness and injury.

An example of such an approach is the village model.

> "We're attempting to solve the problem of aging, and this is what we want to do."
> — Susan McWhinney-Morse

In 2002, Susan McWhinney-Morse and a group of neighbors established Beacon Hill Village to remain rooted and engaged in their local community. This spurred an international village movement that uses a community-based approach to empower adults to live fulfilling lives.

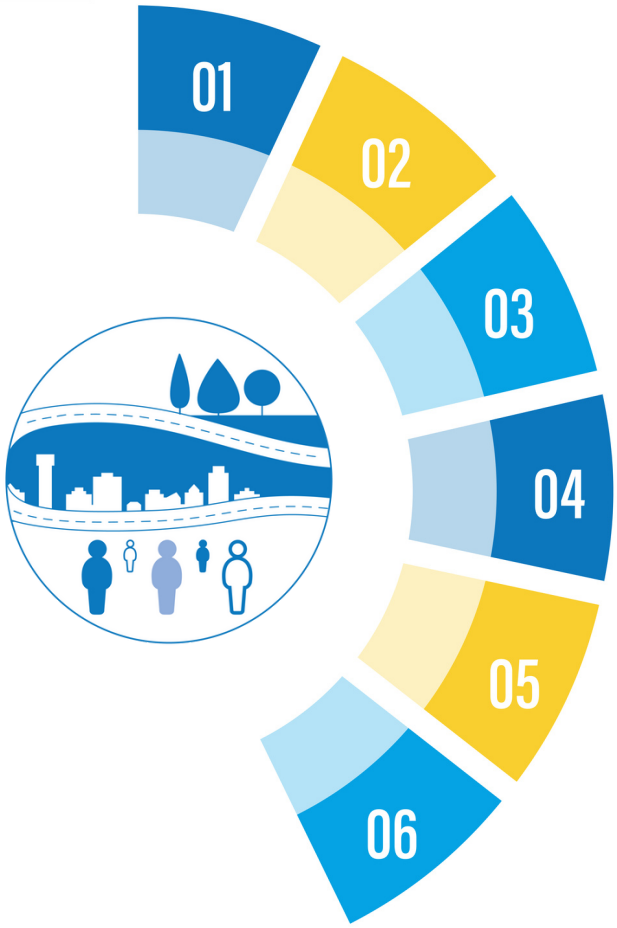
Villages are a network of members and aligned organizations supporting people as they age. Most villages are grassroots, self-governing membership organizations, but they all promote healthy living, neighbor-to-neighbor support, and community connectivity.

In the United States, over 300 local villages provide recreational, social, educational, and cultural programs and services. Recognizing that there are services and assistance existing beyond their scope, villages form partnerships and make referrals to ensure older adults receive services that address their multifaceted needs.

Similar to many organizations, villages face challenges related to a lack of awareness and understanding of what villages are or do, recruiting members and participants, and securing funding to achieve financial sustainability.

Innovative approaches incorporating collaboration and sustainability are needed to strengthen the village movement's reach and impact. A contingent of leaders have engaged in a national conversation on "Reimagining Villages" and transforming them into a more inclusive, sustainable, and impactful part of our country's community care infrastructure.

Village Services



01

Health, Exercise & Wellness Programs:

Walking groups, exercise classes, meal planning, medication reconciliation, etc.

02

Social Engagement:

Friendly visits, reassurance calls, book clubs, excursions to local places and concerts, arts and crafts.

03

Transportation:

Rides to medical appointments, therapy, places of worship, grocery shopping, auto service center, and additional errands.

04

Home Care and Management:

Yard care, organizing closets and garages, changing light bulbs and smoke detector batteries; organizing closets, storage areas, or the garages; caring for pets, gardening chores, seasonal tidying, house sitting, etc.

05

Technology Assistance:

Helping with computers, TV remotes, and cell phones; organizing computer files and email; offering technical support for television, hearing aids, computers, and iPads; and helping with phones, computers, tablets, cable TV remotes, etc.

06

Helpline & Referrals:

Provide patient advocacy; help older adults coordinate services available to them in the community; assist in hurricane emergency preparation. Referrals to fee-for-service providers. General information and referral on topics of concern.

THE DEVELOPMENT OF UPLIFT FLORIDA NETWORK

In November 2019, Rich Harwood, author of the book Stepping Forward: A Positive Practical Path to Transform Our Communities and Our Lives and president of The Harwood Institute for Public Innovation, was invited to give a keynote speech. Presented through Aspirations to Actions (A2A), a TPF initiative, Rich focused on how communities can come together to solve problems and inspire hope while creating change.

Following Rich's visit, TPF facilitated book circles to explore Stepping Forward's concepts, like how communities can come together to solve issues. Deborah Gauvreau, a TPF consultant involved in A2A, decided to start a Stepping Forward book circle at her condominium. When the book circle finished, and it was time to step forward and take action, Mary Haber, who was of Dupont Circle Village, suggested forming a village in Sarasota. Of the eight book circle participants, Deborah Gauvreau and Mary Haber took the lead in exploring the formation of a Sarasota Village.

With forming a Sarasota Village becoming part of her TPF work, Deborah launched a Sarasota Village Exploratory Team with Mary Haber, Brenda MacKay (a good friend of Mary Haber), and Sue Berger, Sarasota County's Aging System Coordinator. Together, they worked toward realizing the aspiration to create a village entity to enhance a strong community of resources.
Over time, it became clear that rather than creating separate villages, a regional hub organization was needed to create economies of scale, perform administrative functions, and leverage resources. With this understanding, Sarasota Village evolved into Suncoast Villages (SCV), a regional umbrella organization serving Charlotte, DeSoto, Manatee, and Sarasota counties.

Suncoast Villages

When Suncoast Villages needed a fiscal sponsor to provide financial management and administrative services that it could access as it built its infrastructure and capacity, Senior Friendship Centers (SCF), a nonprofit in the aging space for 50 years, was an ideal organization to serve in this capacity.

The history and experience of the village movement over the past 20 years and the growing interest and community support in the Suncoast Region were strong indicators that it was the right time and place to create Suncoast Villages as a hub organization. The hub business model supports sustainability because it eliminates duplication, accelerates the development of villages, and provides economy-of-scale savings to all.

By spring 2020, the Suncoast Villages leadership team had evolved to include local volunteers such as Rachel Rivlin, Cynthia Kemp, Carol Levy, and Emile Gauvreau. Deborah and Emile began convening the four villages in Florida and developed the Florida Villages Network to better understand the needs and aspirations of existing villages. These four villages include:

- Lutheran Intentional Village - Upper Pinellas
- Neighbors Network
- Neighbor to Neighbor in the Nenes
- Wellington Cares LLC, A Naturally Occurring Retirement Community

Interest from other areas of Florida emphasized the need for a coordinating organization for Florida's emerging village movement. As a result, UPLIFT Florida Network, Inc. was selected and registered as a more meaningful and reflective name.

UPLIFT Florida Network

The team pivoted to develop a new entity that would begin in Southwest Florida and eventually serve the state of Florida. As the hub, it would fulfill three key functions: develop villages, build networks, and innovate.

Develop Villages

Provide the 501(c)(3) for villages, the website, electronic back-office, and organizational support services to launch villages.

Build Networks

Create relationships with nonprofits, governments, and other organizations to strengthen services for community members.

Innovate

Explore new strategies, services, and alliances in concert with like-minded nonprofit organizations and our participating villages.

To create this high-performing organization, the leadership team redeveloped its business plan and identified three elements of its success, all supported by sufficient funding. In fall 2021, their path forward focused on addressing those key areas:

1. **Organizational Capacity** – Characterized by good leadership at all levels within the organization as well as strong infrastructure, systems, and processes.
2. **Performance** – Characterized by the development and growth of villages, collaborations, strategic alliances, innovation, impact, and financial sustainability.
3. **Culture** – Characterized by the values of compassion, collaboration, inclusion, innovation, and excellence..
4. **Funding** – Characterized by achieving financial sustainability through diversified funding sources and effectively deploying necessary resources.

The Successes

Organizational Capacity

From the beginning, UPLIFT was comprised and powered by a core group of committed and passionate individuals. At the forefront was Deborah Gauvreau, described as the organization's visionary and the lead driver behind the early momentum. She provided strategic and tactical support through TPF, and later on, Kiarra Louis was able to support her in developing systems and advancing UPLIFT.

In the early stages, a Formation Body Team was formed to prepare the organization's 501(c)(3) application and explore how to create new villages and strengthen existing ones. These individuals included Brenda Mackay, Carol Levy, Cynthia Kemp, Rachel Rivlin, Sue Berger, Emile Gauvreau, Deborah Gauvreau, and Kiarra Louis.

A year later, in March 2022, UPLIFT elected its first Board of Directors, as follows: President: Emile Gauvreau; Vice President: Cynthia Kemp; Treasurer: Bill Little; Secretary: Rachel Rivlin; LaVerne Green, Carol Levy, and Pam Mahoney. Sue Berger, Deborah Gauvreau, Brenda MacKay, and Kiarra Louis continued to be key members of the leadership committee.

Performance

UPLIFT's 2022 Annual Report shared its key accomplishments for the year.

Hub Capacity

Under Emile Gauvreau's leadership, the Hub Capacity Team, including Rachel Rivlin and Roger Blanken, qualified UPLIFT as a charitable organization in a local and national nonprofit directory – the Community Foundation of Sarasota County's Giving Partner and Candid's GuideStar. They also developed a board best practices program to engage new board members and opened a bank account, laying the groundwork to end its fiscal sponsor relationship with SFC.

With support and leadership from Kiarra Louis, the MarCom team, including Brenda MacKay and Emile Gauvreau, achieved record-breaking open rates for its monthly newsletter. Brenda MacKay and Kiarra Louis also worked to further develop UPLIFT's technology by launching a public-facing website using Helpful Village (HV) software and setting up a suite of applications.

Village Formation and Integration

Since June 2022, Pam Mahoney and Cathy Lieblich, who co-lead the Village Formation Team, have virtually convened representatives from the four existing villages and two developing villages in Florida to create an exchange of learning and sharing. To strengthen relationships with the villages, the board launched a listening tour to better understand how each village meets the needs of its community, their challenges, and their perceptions of how UPLIFT helps them achieve greater impact.

The Investment Development

The Investment Development Team, led by Cynthia Kemp, laid the foundation for long-term success. In 2022, the entire UPLIFT board financially supported the organization, and a generous match from TPF leveraged these donations to magnify the impact.

Culture
UPLIFT's ongoing efforts to develop a statewide hub organization that strengthens and reimagines the 20-year national village movement is bold, inspirational, tenacious, and innovative — a true testimony to its values.

The Challenges

Building Its Capacity
Increasing the people power fueling UPLIFT's engine is top of mind but continues to be a challenge. As the saying goes, many hands make light work, and UPLIFT is in need of more hands.

Optimizing Its Performance
Due to limited capacity, implementing the strategies and tactics in UPLIFT's strategic plan can be described as slow-moving. The volunteers generously supporting this body of work with their time and energy are doing their best but recognize that paid staff is needed to increase productivity, performance, and execution.

Operating during COVID-19
The meat and potatoes of most villages include being out in the community and engaging with others. Although UPLIFT made great strides by operating and engaging virtually, incorporating more in-person connections and engagements is key to finding people wanting to form a village.

Developing a Strong Culture and Identity
Since values can lay the groundwork for an organization's identity, there is a need for UPLIFT's leadership to define what its values of compassion, collaboration, inclusion, innovation, and excellence mean and identify how they will infuse them in their work.

Finding Investors
Funding is needed to shift the organization's operations into high gear. Additional strategies, like data, are needed to explain UPLIFT's purpose, value, and impact that it can achieve with financial support.

To capitalize on its efforts, UPLIFT must continue to overcome its challenges and seize existing opportunities to propel it toward achieving key priorities.

The Opportunities

Below are four overarching opportunities to propel UPLIFT toward achieving its mission, vision, and desired impact.

Strengthen the Organization's Governance

To increase the board's productivity, there must be an ongoing exploration and execution of board best practices. As UPLIFT evolves, creating a well-established and dynamic orientation program can introduce new individuals to the organization, its mission, and its programs. An orientation program quickens the learning curve of new members and engages them in the organization's activities.

Diversify the Wealth of Knowledge and Perspectives

Leadership can work toward identifying individuals with expertise in building a statewide organization and those with a statewide perspective. To grow its volunteer base, UPLIFT can look to leverage community organizations and networks to expand the reach of its recruitment.

Secure the Funding Needed to Implement and Execute

As UPLIFT's leadership seeks substantial dollars from regional and national funders and investors, they should consider tapping into the robust philanthropic network in the Suncoast region. Significant funding is needed for UPLIFT to operate at a high level, yet smaller grants could bridge capacity gaps or purchase software.

Stick to The North Star

UPLIFT's mission should be its North Star – the foundation of its strategies, development, and execution. Every opportunity is of value, but harnessing and leveraging the ones closely tied to the mission is key. As leadership makes decisions and seeks opportunities, they should ask: Does this align with our mission and deliver on our mission? In time, the organization will have the additional capacity to broaden its efforts in various directions leading back to its North Star.

THE FUTURE OF UPLIFT

In 2020, TPF seeded the creation of what a group of committed volunteers had wanted and stayed at the table as UPLIFT found its identity and built its capacity. Three years later, TPF is ending its engagement with UPLIFT, yet the organization's important work continues under the leadership of its board of directors.

UPLIFT's innovative approach to creating a statewide hub has the opportunity to stimulate and nurture existing and emerging villages that can comprehensively serve many more older adults and support them in aging in place.

UPLIFT's progress thus far has been filled with successes, challenges, and opportunities as its team continues to explore new possibilities to make meaningful changes.

As it looks toward the future, UPLIFT will continue to build a strong organization to advance its mission, enhance its already strong leadership team, expand its talent and experience base, and establish itself firmly as a statewide organization providing services to villages and organizations throughout Florida.

Acknowledgments

As the partnership between TPF and UPLIFT Florida Network closes, success is celebrated. TPF is proud to have been a catalyst for UPLIFT's work in the Suncoast Region and beyond and generously dedicated time and resources to develop this impact report. TPF would also like to thank those interviewed, including UPLIFT's leadership and team, the villages in Florida, and local and national representatives from various organizations.