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UPLIFT Florida Network’s Docuseries
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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.

The Patterson Foundation (TPF) strengthens the efforts of people, organizations, and communities by focusing on issues that address mutual aspirations — such as healthy aging. TPF has a history of creating and strengthening opportunities that optimize the quality of life for people across each generation in Charlotte, DeSoto, Manatee, and Sarasota counties. Capitalizing on its experience and work in healthy aging, in 2020, 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.

UPLIFT Florida Network (UPLIFT) was formed as a state-wide hub organization to address this emerging need. With a mission to improve the well-being of community members via a network that supports individuals thriving in community together, this organization would bring innovative approaches to scale and magnify the impact of villages in Florida.

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:

- TPF’s work to strengthen opportunities to foster a sense of belonging and mutual respect among all people.
- 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.
Dorothy Patterson created TPF with an unfettered charter to do good and do it well. Her unrestricted approach gave TPF the flexibility, opportunity, and responsibility to work in ways other nonprofits, foundations, government, and private enterprises are not doing, cannot do, or will not do. On January 6, 2010, when TPF was beginning, it announced nine legacy initiatives that were created to honor the source of the wealth that created the Foundation. Nine initiatives were selected because, at the time, there were nine planets in the solar system — each with unique orbits, size, and atmosphere—but all were part of a system. The goal was to learn from the legacy initiatives to determine how the TPF could be most effective in its long-term work.

One of the nine legacy initiatives was Aging with Dignity and Independence. Dignity and independence are important concepts for people of all ages and are impacted by the formal and informal support networks we live in. To honor Dorothy’s legacy, TPF created this initiative to focus on understanding the local experience of older adults to enhance aging with dignity and independence within the context of a community and social relationships.

TPF worked with Sarasota County Openly Plans for Excellence (SCOPE) in partnership with the University of South Florida Sarasota-Manatee (USF Sarasota-Manatee) to start conversations, share insights, and foster widespread participation.

SCOPE and USF Sarasota-Manatee conducted the research, and a community advisory committee provided direction during the first year of research, discovery, and analysis. Their research was summarized in the Aging with Dignity and Independence – Actionable Themes: Issues and Opportunities report. The implications of the project were relevant to communities throughout the United States that are also searching to improve the lives of older adults.

TPF’s work as a catalyst for good manifests when entering spaces with partners working toward the same aspirations. When the initiative ended in 2012, its unique community-based approach paved the way for TPF’s future efforts to strengthen opportunities that optimize the quality of life for people across each generation. These efforts included collaborating with the National Council on Aging in 2012, strengthening the Aging Mastery Program in 2015, and leading the effort to achieve a community for all ages with Age-Friendly Sarasota that same year.
TPF worked with the National Council on Aging (NCOA) to achieve a greater impact with and for older adults. TPF and NCOA catalyzed local, regional, and national communities. Connecting and collaborating wove efforts through mutual interests to learn more, share platforms and processes, and evolve systems, resulting in strengthened initiatives. Past examples include the Aging Mastery Program® and Self-Management Alliance initiatives.

The NCOA’s Aging Mastery Program® is a self-paced program that educates and engages older adults as they take manageable steps toward aging well. TPF strengthened the Aging Mastery Program® by supporting the creation of a national-scale approach and working with Senior Friendship Centers, Paradise Center on Longboat Key, and Jewish Family and Children’s Services to bring it locally. TPF also funded organizations in Sarasota and Manatee counties that were implementing the program. These organizations exchanged lessons to strengthen the program’s impact and influence the lives of older adults in our community.

Engaging and supporting NCOA’s collaboration with businesses, government, and nonprofits, the Self-Management Alliance explored how self-managed care might be approached to improve health. TPF’s partnership with NCOA included facilitation at a critical point in the collaboration.

From 2012 to 2020, TPF and NCOA navigated rich and diverse pathways to achieve better outcomes for our communities.

USF and AARP were thought partners as TPF led the process for Sarasota County to become Florida’s first designated Age-Friendly community by the World Health Organization. TPF strengthened the work of Age-Friendly Sarasota by connecting people, businesses, nonprofit organizations, government, and media focused on realizing aspirations of a community where people can live well at any age.

Age-Friendly Sarasota continues to be a partnership between local, state, national, and international entities in leading the effort to achieve a community for all ages. In 2019, Sarasota County Government, a longtime Age-Friendly Sarasota partner, stepped up to lead the initiative and has been a steady force for continuing the development and sharing of age-friendly resources and advancements.

While TPF’s engagement in Age-Friendly Sarasota concluded in April 2023, the connections it catalyzed continue to fuel the initiative’s local efforts and evolve through membership in the global network.

In 2020, another opportunity for TPF to catalyze a national and global longevity movement in the Suncoast region emerged when Deborah Gauvreau brought forward the idea of TPF supporting the formation of a Sarasota Village to address the multifaceted needs of older adults in Sarasota.
According to Florida’s Department of Elder Affairs (DOEA) 2021 demographics data, 27% of Florida’s population is 60 and older. Among that same population, 35% of males and 65% of females live alone.

As people try to live independently as they age, they experience various obstacles related to poverty, daily living activities, and social services. COVID has contributed to and revealed the additional challenges of isolation among community members, especially older adults.

Awareness of the challenges older adults face is essential to ensure they receive the support and services they need to thrive. Ongoing conversations exist on effectively preparing for the current and future population of older adults and addressing their challenges. More is required to make progress toward making Florida’s communities age-friendly.

AARP Public Policy Institute’s (PPI) 2020 Long-Term Services and Supports (LTSS) State Scorecard measuring state LTSS system performance and providing state rankings evaluates Florida’s performance in providing LTSS. Florida ranked 51st out of 51 – a decrease from 46th in 2017. Tennessee, Mississippi, Alabama, Kentucky, and Indiana either improved, or Florida stayed the same or declined in its performance.

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Source: Florida: 2020 Long-Term Services and Supports (LTSS) State Scorecard

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 community care that promote health and well-being and prevent illness and injury.

An example of such an approach is the village model.
In 1999, Susan McWhinney-Morse invited 11 neighbors to her home in Beacon Hill in Boston, Massachusetts, to brainstorm ways to remain rooted and engaged in their local community. In 2002, this group established Beacon Hill Village as a nonprofit organization and enrolled its first members. This grassroots idea led by Susan 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 engaged in 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. They vary in service area size, membership structure, and business model. Rather than operate conventionally as a brick-and-mortar, or a retirement community, most villages are run by volunteers or paid staff who serve as caring neighbors supporting older adults.

Villages create invaluable opportunities for people to meaningfully volunteer their time in helping older adults. These relationships provide those served with emotional security and comfort and those volunteering with enrichment. This is perfectly demonstrated by Sandra Neidert’s experience, one of Neighbor to Neighbor in the Nenes’ (N3) staunchest volunteers, “Connections, relationships, community, and belonging. As a social worker my entire adult life, I spend a lot of time contemplating and studying these concepts; N3 provides me an opportunity to live them. N3 has also opened my eyes to a new concept – one I had not given much thought previously – that aging in place is a beautiful thing.”

In the United States, over 300 local villages provide recreational, social, educational, and cultural programs and services. The services they provide to older adults across the aging spectrum address the wide range of needs of older adults, support the networks providing long-term care, and fill existing gaps in our complex social services systems.

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.
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 Challenges Faced by Villages

Awareness and Understanding
Offering a short, concise explanation of a village in terms of its structures and services is challenging. In Florida, the village concept is obscured by “The Villages,” a master-planned community for active adults 55 years old and over in Sumter County. Staff and volunteers engaged in extensive community outreach would benefit from clear, consistent, and overarching media promoting the neighbor-helping-neighbor village model as a viable resource to strengthen communities.

COVID-19
Like many individuals and communities, COVID-19 forced villages nationwide to pivot. For many villages, in-person activities and services were paused as they figured out how to adapt. COVID-19 provided opportunities for villages to evolve and develop new services, such as teaching people how to use Zoom. Given the vulnerability of older adults to COVID-19, some village members and volunteers are still hesitant to engage in social interaction. This continues to impact their ability to foster participation in their services and grow their volunteer base.

Recruiting Members and Participants
As people age, finding new friendships can become complex. Yet, villages are built-in friendship communities offering the connections people may lack as they age. Many older adults would benefit from social activities and help to age in place — but communicating that message involves great finesse. Volunteers and staff devote significant time and energy to supporting older adults as they become accustomed to engaging with villages and receiving services.

Funding
Villages are supported by membership fees, grants, sponsors, and fundraising that influence their budget. For example, 42% of villages have an annual budget of $25,000 or less. Achieving financial sustainability is challenging, especially for those looking to expand services to benefit all socioeconomic levels. To make villages more inclusive and foster widespread participation, many village leaders recognize the importance of identifying, applying, and securing diverse funding to maximize their impact.

The capacity to undergo the rigorous process of applying for grants can be limited. Communicating why a village needs funding and how it can be used to make an impact can sometimes be unclear or lack the data to prove it. Some villages are concerned that they are overlooked if funders believe they have a small service area. Regardless of their service areas, compared to the cost of medical services or 30-day hospital readmission fees, villages are believed to be cost-effective investments. Work is still being done to quantify and document the value of village services to prove their impact.

Only a small number of villages have received government funding. However, there is an ongoing effort to change that through collaboration with government entities such as Area Agencies on Aging (AAA). The Village to Village Network published Leveraging Resources Handbook: Collaborations between Villages and Area Agencies on Aging to foster greater understanding and catalyze collaborative efforts to serve older adults.

Innovative approaches incorporating collaboration and sustainability are needed to strengthen the village movement’s reach and impact.
Volunteer-Powered

The beauty of the village movement is that villages are often volunteer-powered, and those who use its services can also provide resources to others. Due to the flexibility of volunteering with a village, participation varies, making it difficult to always fulfill requests. Some villages want to expand their reach and grow capacity by hiring paid staff to minimize obstacles associated with being all volunteer based.

Retired volunteers are invaluable advocates and supporters of the village movement. At the same time, there’s a strong desire to recruit working professionals across the age spectrum who can volunteer their professional skills to further support villages in their work.

Reimagining The Village Model

A contingent of leaders in the village movement engaged in a national conversation on “Reimagining Villages.” In 2020, this pioneering campaign transformed the village model into a more inclusive, sustainable, and impactful part of our country’s community care infrastructure. The vision for this model varies. One model begins at a regional level rather than a local level, using a hub and spoke to ensure villages are professionally driven while increasing capacity and limiting duplication in governance and infrastructure.

Building a network of villages where collaboration is facilitated and partnerships are formed appeals more to funders. A shared revenue model enables long-term sustainability. Various village leaders recommend that these new innovative models and approaches can accomplish the following:

- Reduce the time and resources needed to start a village.
- Extend the scope to reach underserved and diverse population
- Build collaborations and strategic alliances.
- Address the health and well-being of communities as well as individuals.
- Leverage technology.
- Maintain the neighbor-helping-neighbor essence of a village.
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, a member of Dupont Circle Village, suggested forming a village in Sarasota.

Why a village in Sarasota? Sarasota County is home to one of Florida’s largest populations of older adults, with over a third (34%) aged 65 and older. Though Sarasota is rich in cultural activities and community services for all age groups, it would benefit from a village strengthening ties, encouraging healthier lifestyles, and promoting socialization.

Of the eight book circle participants, Deborah Gauvreau and Mary Haber took the lead in exploring the formation of a village in Sarasota.

"The book lays out a new path—where we rediscover what we share in common and actively build upon it. Where we value and draw upon the wisdom we already have to improve our lives and communities. Where we bring a greater sense of purpose and meaning back into our lives."

— Rich Harwood, *Stepping Forward*
Mary Haber had been on a lifelong adventure since leaving a small town in Germany at 16 to be a nanny in London. She came to the United States, settling in Washington, D.C., where she lived and worked for over 40 years. Mary recognized the value of building friendships and connections in the community, and with several residents, laid the groundwork for Dupont Circle Village. Mary became a resident of Sarasota when she moved into the Renaissance Condominiums. In 2019, she joined the Stepping Forward book circle started by Deborah Gauvreau. Upon finishing the book, Mary proposed creating a village in Sarasota and later joined a small team exploring the concept in 2020, which evolved into UPLIFT Florida Network. Mary, who passed away on March 27, 2023, did not see the full trajectory of her village vision. She is remembered for her energy, zest for life, and her passion for progress and innovation in Sarasota.

Deborah Gauvreau discussed with Debra Jacobs, President and CEO of TPF, the idea of forming a village becoming part of the work she does with TPF. TPF was honored and delighted to support a group of volunteers in doing so.

Using TPF’s approach, Deborah knew not to arrive with the answer. With this in mind, 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.

In 2020, the team began using the Consolidated Village Guide by Washington Area Villages Exchange (WAVE), a forum of numerous D.C. area villages to discern the best next steps toward realizing the aspiration to create a village entity to enhance an already strong community of resources.

Early steps included:
- Identifying, assembling, engaging, and inviting individuals to join the Exploratory Team.
- Sharing the Sarasota Village concept with individuals and organizations.
- Securing a membership with The Village to Village Network (VtV), an organization that brings Villages together to share best practices for enabling older adults to live independent, healthy, purposeful lives with connections to their communities.
- Working with their assigned mentors by VtV, the executive directors of Georgetown Village and Dupont Circle Village.
- Identifying the best model and services for this community.
- Developing infrastructure, and identifying and implementing a back-office service for the Sarasota Village.
- Developing and administering a community assessment to learn about interests and to avoid duplication of services.
As the Exploratory Team held community meetings, people shared their aspirations and interests relative to the village concept. They were enthusiastic about further strengthening services for older adults, emphasized the importance of creating partnerships in the community, and expressed interest in having a village in their communities.

Over time, it became clear to the Exploratory Team 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’ Hub and Spoke Model

Suncoast Villages needed a fiscal sponsor to provide financial management and administrative services it could access as it built its infrastructure and capacity. Senior Friendship Centers (SFC), a nonprofit in the aging space for 50 years, was an ideal organization to serve in this capacity. SFC provides services and programs such as adult day services, activity centers, caregiving resources, healthy meals, exercise classes, and more in Sarasota, Venice, Charlotte County, DeSoto County, and Lee County. SFC understood the population Suncoast Villages was trying to serve and worked in the communities where it hoped to build villages.

From SFC’s perspective, it was clear that Suncoast Villages was trying to make the community a better place, and that resonated with them along with the idea of humble beginnings. Those who have been with SFC for a number of years remember how difficult it is to get something going. They wanted to do their part in helping a fellow nonprofit looking to do something in the aging network get going. Since SFC recognizes they do not have the ability or the capacity to solve all the problems, having more players in the aging space makes us better and makes the community better.
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. Numerous villages currently use a hub business model to support sustainability because it eliminates duplication, accelerates the development of villages, and provides economy-of-scale savings. Spoke villages would handle day-to-day operations, programs and services, and local fundraising, whereas the hub would potentially oversee processing payroll, financial reporting, and background checks.

As a hub organization, SCV would provide 501(c)(3) status and administrative, development, human resources, and financial services to all spoke villages within its network. As a village catalyst and coach, public educator, marketer, and advocate, SCV would form multi-village strategic partnerships and work to raise corporate, government, and foundation funds on behalf of the collective. The chart below illustrates the potential functions of a hub and its village spoke.

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<tr>
<th>THE HUB</th>
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<tr>
<td>SETTING UP A BACKGROUND CHECKS SYSTEM WITH ASSISTANCE FROM THE SPOKES</td>
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<td>RECRUITING VOLUNTEERS AND MEMBERS</td>
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<td>DESIGNING, DELIVERING, AND EVALUATING THEIR PROGRAMS AND SERVICES</td>
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<td>MAINTAINING THEIR VOLUNTEER, MEMBERS, AND DONOR RECORDS</td>
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<td>LOCAL FUNDRAISING</td>
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<td>HIRING AND SUPERVISING THEIR STAFF</td>
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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. Locally, dozens of meetings with leaders and organizations were held to listen, learn, share, and synthesize. Examples include: The Paradise Center Longboat Key, Sarasota County Aging Stakeholders, The Area Agency on Aging for Southwest Florida, Tidewell Foundation, Downtown Sarasota Condominium Association, Neighbors Network of Lee County, and the Village to Village Network.

Deborah and Emile Gauvreau also 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, in early September 2021, Suncoast Villages worked to create a more meaningful and reflective name for Suncoast Villages.

UPLIFT Florida Network, Inc. was selected and registered. The mission of UPLIFT remained the same. The only difference was changing the focus from creating a regional hub that supports the formation of villages throughout the region to developing a statewide hub that supports existing villages and the formation of villages throughout the state.

**UPLIFT Florida Network**

Joining the conversation to “Reimagine Villages,” UPLIFT saw the opportunity to play an important role in the next generation of the village movement. The team pivoted to develop a new entity that would begin in Southwest Florida and eventually serve the state of Florida. The network would fulfill three key functions as the hub organization.

- **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.

Rather than operating as an independent village, UPLIFT hoped villages would see value in becoming a spoke in the hub organization. UPLIFT’s developing innovative approaches would advance its capacities to scale and magnify impact in the following ways:

- **By serving as a hub organization**... UPLIFT would provide strength and flexibility to its network of volunteer-driven villages and support sustainability with centralized administrative functions and economies of scale.
- **By being professionally driven but volunteer-powered**... UPLIFT would support the growth and impact of volunteer-led villages with best practices, innovative programs, and expansion in underserved areas.
- **By forming strategic alliances**... UPLIFT would lower barriers to services and care through statewide public and private sector strategic partners.
- **By developing diverse revenue streams**... UPLIFT would open opportunities not possible for individual villages to provide financial sustainability.
- **By evaluation**... UPLIFT would measure effectiveness and outcomes to provide strong evidence of the efficacy of villages to funders.
By being an advocate... UPLIFT would amplify our voices in advocacy for aging.

By offering innovative programs... UPLIFT would develop programs that foster community connectivity, promote healthy living, and provide additional revenue.

To create this high-performing organization, the leadership team redeveloped its business plan and identified three elements of its success: organizational capacity, performance, and culture, all supported by sufficient funding.

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.

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**The Successes**

**Organizational Capacity**

From the beginning, UPLIFT was comprised and powered by a core group of committed and passionate individuals who genuinely see its value and are willing to use their time, talent, and treasures to create a future that will help people age in place. At the forefront was Deborah Gauvreau, described as the organization’s visionary and the lead driver behind the early momentum. She energized the idea of creating a village and could discern and devise strategies to transform concepts and aspirations into actions for people to execute, all while inspiring others to participate. With the opportunity to include UPLIFT as her body of TPF work, she provided strategic (human capital assistance) and tactical (technical assistance) support. Later, Kiarra Louis supported her in developing systems, strategies, and processes to advance UPLIFT while striving for excellence.

TPF played a role in supporting UPLIFT in developing its organization capacity, but great strides made were due to its core group of volunteers that continues to evolve with the organization to this day. In the early stages, a Formation Body Team was formed to prepare the organization’s 501(c)(3) application. These individuals included Brenda Mackay, Carol Levy, Cynthia Kemp, Rachel Rivlin, Sue Berger, Emile Gauvreau, Deborah Gauvreau, and Kiarra Louis.

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**Launching a Statewide Hub**

Given that UPLIFT is looking to build a high-performing organization evaluated on organizational capacity, performance, and culture, all supported by obtaining sufficient funding, this report will primarily explore the organization’s success and challenges through those same lenses.
Their work explored how UPLIFT could provide villages with a 501(c)(3), create relationships to strengthen services for older adults, and engage in new strategies, services, and alliances. They regularly convene to discuss and determine the answers to questions such as:

- As an administrative entity, how will the organization provide the 501(c)(3) for villages in the region and eventually across the state?
- As a network builder, how will the organization create relationships with nonprofits, governments, businesses, and other organizations to strengthen services for people wanting to live independently?
- As an innovator, how will the hub explore new strategies, services, and alliances in concert with like-minded nonprofit organizations and participating villages?

Clearly, the work ahead was not small, but they were not deterred from becoming a networked resource supporting individuals desiring to thrive in a community while maintaining their well-being.

Nearly a year later, in March 2022, UPLIFT elected its first Board of Directors: Emile Gauvreau (President), Cynthia Kemp (Vice President), Bill Little (Treasurer), Rachel Rivlin (Secretary), 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 as they worked toward creating the entity. With their diverse skills, ranging from corporate insurance to aging to military, each of their perspectives and abilities propels the organization.
There is diversity in the skills and experiences of UPLIFT’s current people power, from corporate insurance, aging and long-term care, and the military to management consulting, finance, corporate development, public health, real estate investment, health care, and more. Each perspective and skill is used to evolve, strengthen, and propel the organization.

**Hub Capacity**
UPLIFT’s working board plans and implements organizational strategies and objectives. They strive to adopt and follow best practices and make meaningful personal contributions according to their means to attain 100% board giving. With board members Rachel Rivlin and Emile Gauvreau at the helm of creating UPLIFT’s corporate structure, UPLIFT successfully developed its organizational documents and financial management policies.

In April 2023, the board began refining the design of the organization’s structure to form well-defined teams to facilitate its operations and recruit volunteers and board members.
UPLIFT’s 2022 Annual Report shared its key accomplishments for the year. 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 for UPLIFT to end its fiscal sponsor relationship with SFC.

The Marketing and Communications (MarCom) and Technology teams also have noteworthy accomplishments. 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 to support UPLIFT’s mission.

**Village Formation and Integration**
Since June 2022, Pam Mahoney and Cathy Lieblich, co-leads of 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. These meetings continue to evolve to offer the villages information and resources. This was exemplified when Pam leveraged her connections with Tim Dutton, an expert in asset-based community development (ABCD), to have him facilitate training in the ABCD approach. Tim’s presentation explored opportunities for villages to incorporate ABCD into their work.

> By using this process for formation and ongoing operations, a village can take advantage of partnerships within the community and enhance services while avoiding duplication. ABCD is not a one-and-done process. Villages should continue to use this process in all stages of their lifecycle to understand their members’ changing capabilities and needs and their broader community environment of alliances and partners. By doing so, villages can continue to be relevant to members while sustaining and expanding their membership, services, and internal operations.

— Pam Mahoney
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 can help them achieve greater impact.

In addition to the villages, UPLIFT continues to seek opportunities to form strategic alliances and partnerships with various organizations to support its mission.

**Development**

Led by Cynthia Kemp, the Development Team’s accomplishments are primarily centered around laying the foundation for long-term success. Investment in UPLIFT begins with the commitment of board members to contribute. The entire UPLIFT board financially supported the organization in 2022. A generous match from TPF leveraged these donations to magnify the impact. Anticipating that philanthropic foundations and mission-minded individuals will be an essential source of financial sustainability, the team created a foundation for future giving. Strategies include developing UPLIFT’s value proposition and creating a database of potential grantors whose giving profile matches UPLIFT’s mission.

**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 Gauvreau’s have been a dynamic duo and a driving force behind the innovation. Recognizing the challenges villages face and understanding the potential impact of new models and approaches, they willingly experimented with a more scalable and sustainable model. This process of constantly reimagining what villages could be is contagious and has spread throughout the organization.

Cynthia Kemp, UPLIFT’s board president, shares the passion and vision for reimagining villages. To her, the effort to reimagine villages confirms the value and potential of UPLIFT as a statewide network, and like many others within the organization, she is excited to see UPLIFT fulfill its potential. With her leadership, UPLIFT is searching for ways to connect and collaborate with others and explore new possibilities that strengthen the capacity, functionality, and impact of current and future villages in Florida.

“

The best way for UPLIFT Florida Network to predict its future is to create it – together with the current and future villages across Florida.

— Cynthia Kemp

"
Building Its Capacity

In June 2022, Deborah Gauvreau unexpectedly needed to take a step back from her role in the organization. With the loss of her direction and momentum, UPLIFT’s work paused as leadership determined the best path forward to achieve the vision. The goal of increasing the people power fueling UPLIFT’s engine was still top of mind, but progress slowed. Before, Deborah had been the primary connector and influencer seeking to recruit people with the necessary skills and expertise for the organization. Many people currently volunteering with UPLIFT initially connected with UPLIFT because of Deborah or through connections with her. For example, Pam Mahoney heard about UPLIFT through TPF’s newsletters. Since she has been in the community for a long time and has had the chance to work with Deborah in the past, once she saw her name attached to the initiative and saw the idea, she jumped on it. In Deborah’s absence, UPLIFT has recruited two additional volunteers: Roger Blanken, UPLIFT’s current Board Treasurer, and Diana Shoemaker, UPLIFT’s current Board Vice President.

As the saying goes, many hands make light work, and UPLIFT needs many more hands. There is a need to identify volunteer opportunities within the organization, determine the necessary skills and expertise, and fill those positions with the right people. This requires the time and capacity that UPLIFT is still trying to develop, but it also needs a clear understanding of what UPLIFT is and what it is trying to achieve. Similar to the challenges villages face, communicating what a village is, what a hub is, and why both are needed has not been a small feat. One of UPLIFT's approaches is to obtain paid professional staff, such as an executive director, to devote more time and energy to moving the organization forward.

To work towards becoming a statewide organization, UPLIFT needs individuals with expertise in building a statewide organization and those with a statewide perspective, but also representatives throughout Florida. The current team is predominantly in the Suncoast area, except for Cathy Lieblich, who resides in Orange County, Florida.

Optimizing Its Performance

Hub Capacity

Conceptualizing and developing plans and strategies are also one of UPLIFT’s strengths. UPLIFT’s strategic plan outlines several strategies and tactics, yet there is a lack of execution to transform those strategies into tangible realities. Due to limited capacity, implementation and execution have been ongoing challenges. UPLIFT’s impact can only be achieved if it creates an ongoing cycle of conceptualizing, developing, and executing the work it has laid out for itself.

Although the organization has continued to pivot and evolve regarding mission, vision, and focus, the people within the organization have yet to evolve simultaneously. For example, from the beginning, it was clear to Deborah Gauvreau that there was a need to reimagine villages. This is why the original idea to build a village pivoted to simultaneously building a village and regional hub organization. Over time, that narrative has become lost, and there is a lack of understanding of why UPLIFT has evolved to what it is now, so there continue to be questions that individuals are wrestling with today.
Since each board member has joined the organization at different phases of UPLIFT’s evolution, there is an unclear understanding of UPLIFT’s identity and priorities. A well-established and dynamic orientation program for volunteers and board members is needed to quicken the learning curve of new members to get them quickly engaged in the organization’s activities.

UPLIFT board meetings demonstrate that each board member is invested in what they are doing. Yet, as a working board, there are opportunities to increase the productivity of each monthly meeting. Progress is being made on this end, with UPLIFT’s new leadership having conversations to address the structure of the board meetings. Each board meeting has always had an agenda, and it has evolved to become more robust. All agendas are sent beforehand, but there’s a need to provide detailed instructions or set expectations on how to engage with the agenda rather than just reviewing it. Each item may require a different engagement. Whether to review, revise, or respond, these actions must be provided beforehand.

Many nonprofits have board meetings primarily focused on giving and receiving updates, with the remaining time for making decisions. UPLIFT has adopted a similar trend. Most of the allotted meeting time is devoted to updates, with little time for discussions and decisions that affect the organization’s mission, vision, and work. Updates can be sent along with the agendas beforehand to ensure everyone comes to the meeting aware of the organization and team activities. That will allow the board time to develop strategies, make decisions, and create actionable steps between each meeting. Since this is lacking, major decisions still need to be made by the board that still need to be solved.

Each of UPLIFT’s current and emerging teams needs additional capacity to support its ability to perform and execute its work. In the meantime, there are areas for each team to strengthen its efforts. There are "small wins" that the governance team (previously the hub capacity team) can identify and execute to move the organization forward. These small wins include but are not limited to recruiting new board members, adopting a best practices program for the board, establishing a staffing plan, and developing a volunteer management program. Efforts in these areas have been present but scattered. With prioritization, much can be accomplished further to develop the governance and operational functions of the hub.

Since the work of the MarCom team is primarily outward facing, the upward trajectory that it has established and the positive strides that it has made must be continued. The efforts of the MarCom team are closely tied to UPLIFT’s ability to achieve its other objectives. UPLIFT’s ability to identify and secure the funding, the people, and the connections it needs is undergirded by its ability to tell its story authentically, effectively, consistently, and continuously. If that does not become a priority for the entire organization, and not just the dynamic duo now comprising the team, achieving the thrivability it is looking for will be difficult.

Village Formation and Integration
Since the meetings with the existing and developing villages began a year ago, information, connections, and resources have been exchanged. Both Pam Mahoney and Cathy Lieblich have established relationships with the village representatives, and each village sees the value of a hub organization addressing their operational and administrative challenges and achieving economies of scale for more efficient use of resources.

Village Formation and Integration
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Collaborating with the existing villages to integrate them into UPLIFT’s network
Support interested individuals in developing villages so they can launch in less time

However, nearly two years after Deborah and Emile Gauvreau started the Florida Villages Networks to connect and engage in conversation with the existing villages in Florida, UPLIFT continues to try to identify and understand their needs and how it can best support them. Creating a network of villages is central to UPLIFT’s mission and a key component of its strategic plan. Doing so requires a two-pronged approach:

1. Collaborating with the existing villages to integrate them into UPLIFT’s network
2. Support interested individuals in developing villages so they can launch in less time

There is progress within each aspect of the approach, but it is slow-moving. This is best exemplified by UPLIFT’s attempt to create a Village Development Toolkit that guides individuals interested in developing a toolkit that guides them through every step of the process – sharing best practices, providing advice and technical assistance, and advocating for establishing relationships with UPLIFT to make the process of forming and managing a village less expensive to operate. Despite early momentum with the toolkit, progress stalled when it was time to discuss and include responses to the following questions that arose: What would be the responsibilities of the hub and its village? How would each village be governed? Who would be responsible for the decision-making process within the hub and each village? Most importantly, could UPLIFT deliver on what it was promising to offer?

These questions have continued up to today, and varying answers and perspectives are provided, but nothing concrete has been decided or provided. After nearly three years of engaging with UPLIFT, the villages are questioning if UPLIFT has the capacity and the resources to fulfill and deliver what it has continued to offer, especially as it faces the same challenges that the villages do.

Additionally, there are conflicting views that exist amongst the organization and villages on what the role of the existing villages are as the UPLIFT builds itself. Some believe the existing villages have to be partners for this relationship to work, meaning they must be willing to commit to making UPLIFT the organization they want it to be so it best serves them. An issue with that is the fact that the villages are struggling and facing various challenges, which is why they need the support of an organization like UPLIFT in the first place. Given that some may feel like they are in survival mode or are too bogged down with the activities and problems of their village and ensuring it functions, this could be a big ask — perhaps too big of an ask. From the village perspective, some see themselves as guides, directing UPLIFT in the direction that would be most helpful to them or in providing services that would address their emerging needs. For some people on the ground doing the work, supporting or partnering in building the UPLIFT organization is not the right relationship for them. Moving forward, this will need to be addressed and established, and the questions that remain unanswered.

So, where does that leave UPLIFT? There is great energy and momentum in hosting an in-person convening in Sarasota in June 2023 with the existing and developing villages in Florida. The purpose is to have a facilitated conversation to identify and understand the needs of the villages, identify potential services UPLIFT could provide, and determine a path forward that works for them and UPLIFT. One concern is whether UPLIFT will use the information and insights gleaned in the convening to make and commit to decisions that have lingered on the roles, responsibilities, and governance of the hub versus the village and provide the resources it has conceptualized and offered to the villages.
Since UPLIFT was founded amid COVID-19, its operation has been in COVID mode and is only now emerging. On a positive note, UPLIFT’s early beginning proved people can accomplish all sorts of things during the pandemic, including starting a new nonprofit. Back then, connections and engagement were strictly done remotely through the confines of one’s home to avoid contracting and spreading the virus. With the virus evolving and treatments becoming increasingly available, there is a trend toward a new sense of normalcy that allows people to connect and engage in various ways in-person rather than solely through the phone or a Zoom screen. As someone shared, the meat and potatoes are 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 with shared aspirations.

**The Opportunities**

**Developing a Strong Culture and Identity**
UPLIFT needs to grow its people power with individuals who believe in its purpose, but especially in its principles and beliefs for achieving its mission and vision. Creating a strong culture and identity is essential to recruiting and attracting the right people with the right skills to the organization. Since values can lay the groundwork for an organization’s identity, UPLIFT’s leadership must take the time to discuss and define what its values of compassion, collaboration, inclusion, innovation, and excellence mean and identify how they will infuse them throughout their work. This is missing to some extent within the organization, contributing to the challenge of finding those who are a fit, establishing an identity of what UPLIFT is or isn’t, and what it will do or won’t do given the parameters of its values.

In October 2021, Deborah Gauvreau, Emile Gauvreau, Cynthia Kemp, and Roger Blanken presented their working business model to Debra Jacobs and Michael Corley, TPF’s Senior Consultant, for input. An element of the feedback received is still relevant as UPLIFT further establishes its culture and identity by shifting from issues to aspirations. UPLIFT has the opportunity to shift its focus from problems, challenges, and barriers to a shared vision and new possibilities. UPLIFT’s current narrative can continue to evolve to be more aspirational and positive as it focuses on what is possible rather than come from a deficit approach which contrasts its innovative approach. Possibilities and passions sell and inspire. Incorporating that more into their culture, identity, and story will further support them in building capacity.

Although this is one of TPF’s approaches, it is something for UPLIFT’s leadership to consider and not necessarily adopt as they continue to find ways for people to engage and create their desired future.

**Finding Investors**
Masterfully, UPLIFT’s leadership has leveraged the generosity of its board and TPF’s match to begin securing funding to operate. However, more is needed to achieve sustainability. More conversations are happening to discuss strategies and opportunities to obtain funding and further develop UPLIFT’s value proposition.

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. Although these grants may be relatively smaller and have restrictions (ex., limited to capacity or capital purposes), applying for and receiving one or more local grants is a pathway for
UPLIFT to grow its funds, demonstrate impact, build its credibility, and further refine its message and story to provide its value to other potential funders. Reaching out to regional philanthropic leaders is one way to tap into the existing collective resources and gain visibility.

Significant funding is needed for UPLIFT to operate at a high level, hire staff, and transition from being volunteer-powered to professionally driven. However, there are also additional yet smaller costs that grants could help with, such as hiring freelancers or consultants to bridge capacity gaps or purchasing software to help organize, streamline, and prioritize. Identifying how small and large funding can be used in the short- and long-term to grow the organization into the hub it wants to be is invaluable.

UPLIFT’s mission to improve the well-being of individuals and communities via a network of villages and organizations supporting them should be its North Star – the foundation of its strategies, development, and execution. There’s no shortage of opportunities and possibilities as UPLIFT seeks to create vibrant, sustainable villages locally and throughout the state. Every opportunity is of value, but harnessing and leveraging the ones closely tied to the mission is key.

To stay grounded and on course, as the organization makes decisions, forms partnerships, and seeks opportunities, leadership should ask these two questions: Does this align with our mission? Does this 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 contributions of UPLIFT’s leadership and team are moving the organization forward in some way. To capitalize on their efforts, they must continue to overcome challenges and seize existing opportunities to propel the organization toward taking action on key priorities.

THE FUTURE OF UPLIFT

Back 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, the end of TPF’s engagement with UPLIFT can be described as a sunset.

UPLIFT’s important work continues under the leadership of its board of directors as TPF continues to laud with excitement and pride at the energy and talent around the table. With its efforts to reimagine villages and affirmation from governmental agencies, community and aging-oriented organizations, and philanthropic organizations, UPLIFT’s innovative approach can transform community care for older adults statewide across the socioeconomic spectrum.

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.
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 to dedicate time and resources to develop this report. TPF would also like to thank those interviewed to create this impact report, including UPLIFT’s leadership and team, the villages in Florida, and local and national representatives from various organizations.

APPENDICES

Information for this report was provided by UPLIFT’s website, UPLIFT’s internal drive, and interviews with UPLIFT leadership, community supporters, and administration. Debra Jacobs, president and CEO of The Patterson Foundation, and TPF consultant Deborah Gauvreau supported and guided the process as Kiarra Louis drafted this report.

Appendix A: List of Interviewees

**UPLIFT Leadership and Team**

Board of Directors
- Cynthia Kemp, Board President
- Diana Shoemaker, Board Vice President
- Roger Blanken, Board Treasurer
- Emile Gauvreau, Board Secretary and Past Board President
- Pamela Baron Mahoney, Board Member
- Cathy Lieblich, Board Member
- Bill Little, Board Member

Ex-officio:
- Brenda MacKay, Founding Volunteer
- Sue Berger, Sarasota County’s Aging System Coordinator

Other
- Rachel Rivlin, Former Board Secretary

**The Patterson Foundation**
- Debra Jacobs, President and CEO
- Deborah Gauvreau, Consultant
- Kiarra Louis, Initiative Support Coordinator
Villages in Florida
- Carrie Gaudio, Executive Director, Neighbor to Neighbor in the Nenes
- Cathy Lieblich, President, Neighbors Network
- Diane Gutman, Director of Operations, Wellington Cares LLC, A Naturally Occurring Retirement Community
- Margo Walbolt, Lutheran Intentional Village - Upper Pinellas
- Patty Duncan, Co-Lead, Neighbors Network of Lee County

Local and National Individual Organizations
- David Blehar, Chief Financial Officer & Chief Operating Officer, Senior Friendship Centers
- Joel Shapira, Founder and Chief Orchestrator of Beyond Age Consulting
- Suzy Brenner, Executive Director; The Longboat Key The Paradise Center

Appendix B: Milestones and Evolution of UPLIFT

2019
- Rich Harwood, author of the book "Stepping Forward" and president of The Harwood Institute for Public Innovation, gives a keynote speech at the Manatee Performing Arts Center in Bradenton, Florida. His book encourages people to Turn Outward to work toward shared aspirations within their community. As a result, TPF begins facilitating and supporting at least 100 book circles open to the public to explore the concepts in "Stepping Forward," which focuses on how communities can come together to solve issues while creating a culture of shared responsibility renewing civic faith.
- Deborah Gauvreau, a TPF consultant, begins a Stepping Forward book circle at her condominium to connect, learn, and share with her new neighbors. Book circle participant, Mary Haber, becomes inspired by the idea of creating a Sarasota village.
- TPF begins facilitating the incubation of a Sarasota Village.
- Brenda MacKay, Emile Gauvreau, Sue Berger, and Cynthia Kemp join the movement to make the idea of a Sarasota Village a reality. A Sarasota Village Exploratory Team is created to explore interests, aspirations, and possibilities. The team begins holding community meetings and conversations with individuals and representatives of area organizations providing services for older adults to generate interest in creating a village in downtown Sarasota.

2020
- Of the eight book circle participants, Deborah Gauvreau and Mary Haber take the lead in exploring the formation of a Sarasota Village.
- The Exploratory Team’s research guides the development of a hub. Suncoast Villages becomes the new model to serve Charlotte, DeSoto, Manatee, and Sarasota counties, and Senior Friendship Centers becomes the fiscal sponsor for the organization.
- The organization’s name changes from Suncoast Villages to UPLIFT Florida Network to better reflect the mission and statewide focus.
2022

- UPLIFT receives approval from the IRS for its 501(c)(3) status.

- UPLIFT elects 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 remain key members of UPLIFT’s leadership committee. UPLIFT also hosts a virtual Lift Off event to formally announce it’s starting to implement strategies as a new organization within Florida’s ecosystem.

- UPLIFT’s village development initiative launches with a village formation orientation for individuals interested in forming a village and organizations interested in creating a strategic partnership.

- Deborah and Emile Gauvreau represent The Patterson Foundation and UPLIFT Florida Network at the Florida Blue Foundation 17th Annual Community Health Symposium and Sapphire Awards conference. This year’s Symposium theme is Big Issues in Health: A Focus on Health Equity. UPLIFT was honored to present Healthy Aging for All Floridians – A Fresh Approach. Two leaders from Florida villages participated in the Q&A: Cathy Lieblich with Neighbors Network and Diane Gutman with Wellington Cares. The presentation gave attendees insights into burdens arising from dramatic demographic shifts and covered UPLIFT’s development.

- Pam Mahoney and Cathy Lieblich begin hosting ongoing meetings to engage representatives from existing villages and developing villages in Florida.

- Deborah Gauvreau steps back from being a driver of UPLIFT and continues to support from the background.

- As 2023 approaches, Deborah decides to close her TPF chapter and begins supporting the transition of UPLIFT from TPF’s portfolio. TPF strives to enter and depart collaborative spaces at appropriate times.

- UPLIFT’s board launches a listening tour to understand how each village meets the unique needs of its community and gain greater clarity around the challenges villages face and their perceptions of the role UPLIFT can play to help them achieve greater impact.

2023

- UPLIFT has its first-ever official board meeting in March and selects the following 2023-2024 officers: Cynthia Kemp as President of the Board; Diana Shoemaker as Vice President of the Board; Rachel Rivlin will remain as Secretary of the Board; and Roger Blanken as Treasurer of the Board.

- TPF closes its engagement with the UPLIFT initiative and discontinues its staff and consultant time related to the initiative. The TPF’s UPLIFT webpage moves from “Current Initiatives” to “Past Initiatives.”
Appendix C: Aging in Florida Data

The Aging in Florida dashboard provides insights into the living arrangements, health status, behaviors, and conditions of older adults in Florida that prove these challenges exist.