



San Francisco Village

Strategic Plan
2022-2026

“ San Francisco Village is a membership organization designed with, by and for older San Franciscans and the extended community that champions them. ”

Introduction

Together, we are living through a period of extraordinary social change. In response, the staff and Board of Directors at San Francisco Village (SFV) have engaged in courageous self-reflection about who we are, who we've been and who we hope to become. As ever, the heart of our work remains connecting older adults to the community, resources and expertise they need to navigate the transitions of aging. We imagine an expanded and inclusive community that represents all San Franciscans, who share our mission to co-create an enduring web of connection. This strategic plan amplifies and deepens this commitment, while preparing SFV to thrive in a rapidly shifting social environment.

Founded on principles of reciprocity and shared interest in 2009, SFV has built an infrastructure for delivering social care to older San Franciscans: high-quality relationships; access to resources; mutual aid and support; opportunities for volunteerism and social integration; and contributing to the greater good.

SFV is one of 44 villages in CA and 250 nationwide. It is a founding partner of Village Movement California (VMC), the statewide coalition advocating for villages at the state level. The village model is recognized in the California Master Plan for Aging and VMC is being charged with adapting and replicating the model across the state.

In a post-pandemic, climate-changing world, the values that underpin VMC and operationalize SFV are part of an emerging zeitgeist. We're all in this together. Caring for people should be part of the national infrastructure. An inescapable network of mutuality, tied in a single garment of destiny.¹ People of all ages are challenging the narratives of separation, individualism, and "I Alone Can Do This" that dominate our culture, concluding they are harmful.

¹ Rev. Martin Luther King Jr., Letter from a Birmingham Jail, April 16, 1963.



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A recent Harvard study identifies young adults, aged 18-25, as the loneliest generation.² The second loneliest demographic is older adults. SFV is a well-established platform for building connections among the generations that result in a greater sense of belonging and mutual well-being. For older adults, it's an opportunity to contribute to the future. For younger adults, it's connecting to history in order to see their way forward. SFV serves as a laboratory for prototyping human connection and care. VMC is the vehicle to scale the best ideas.

² <https://www.nytimes.com/2021/03/18/well/family/lonely-generations-young-adults-seniors.html>

San Francisco Village is a membership organization designed with, by and for older San Franciscans and the extended community that champions them.

Mission Our purpose: what we do and why we do it

We operationalize love for elders in an ageist society by mobilizing the power of intergenerational relationships and mutual support.

Vision The long-term transformational change we aim for

We envision a future in which people of all ages, races, cultures and abilities work together to create communities of belonging and in so doing, model possibilities for relationship and connection that benefit the greater good.

What We Value The essence of our organization: the shared principles that guide our work

Intersection of health care and social care

We believe optimal health, especially as it relates to navigating the transitions of aging, requires social connection, access to care and knowing that we belong to something bigger than ourselves.

Eldership

We believe the wisdom and lived experience of elders is precious and much needed in the world today. We encourage our members to embrace new learning as we orient to a changing future, seeking opportunities to share and lead as we deepen our community.

Intergenerational Relationships

We believe people of all ages need each other to thrive and that the world needs intergenerational solutions to complex problems like inequality, climate crisis, racial justice, isolation and loneliness. We come together to explore the possibilities.

Co-Creation

We believe in standing shoulder to shoulder with one another to build a caring community that reflects the beauty of its varied members.

Equitable Community

We strive to be an anti-racist organization and commit to challenge white dominant culture through our words and actions.

Self-Reflection

As agents of change in the outer world, we accept the responsibility to do our own inner work and the discomfort and opportunities that may bring. We strive to live our values in all our words and behaviors, and to hold ourselves accountable for our growth.

Humility

As leaders in the Village movement, we promise to let go of old assumptions about aging and individualism, to challenge conventions that create separation and hierarchy, and to act in ways that inspire trust, growth and connection.

Spontaneity

We believe in saying YES to play, partnerships, collaboration and opportunities that arise unexpectedly and help take us to new places.

Our mission, vision and values provide the foundation for the critical relationships that comprise San Francisco Village. During the past 13 years, these foundational precepts have evolved to meet the needs of a growing community and a changing world. What remains unchanged is our belief that humans are inherently relational, responsive beings and the human condition is one of connectedness and interdependence. ³

³ Dr. Carol Gilligan, Ethics of Care, <https://ethicsofcare.org/carol-gilligan/>



At a time when trust in our basic social contracts is eroding, the work of SFV as an intentional caring community is more essential than ever. We are compelled to consider how we can meet the needs of more elders, in new ways and through different delivery methods.



Priorities for the Future

This plan was developed in the shadow of a tumultuous 20 months that included a global pandemic, a summer of racial protests incited by police violence against Black citizens, a contentious political election, devastating climate events, attempts to overturn the presidential election and massive disinformation campaigns.

At a time when trust in our basic social contracts is eroding, the work of SFV as an intentional caring community is more essential than ever. We are compelled to consider how we can meet the needs of more elders, in new ways and through different delivery methods. A growth strategy that is inclusive, intentional, responsive and mission-driven. At the same time, this is a plan for sustainability, addressing questions about market relevance, up-to-date technology, and financial stability. To achieve our immediate goals and ensure long-range success, this plan identifies four priorities:

- 1. To ensure our programs and services create a more diverse organization and advance *racial equity* for our current and future members.** San Francisco is a diverse city of many cultures, races and ethnicities and yet, SFV serves a predominantly white membership. SFV will strive to challenge the assumptions that uphold white dominant culture and make every effort to give greater access to programs and services for Black, Indigenous, Latinx, Asian Pacific Islanders (API) and other less represented communities of San Francisco.
- 2. To maximize the potential of our *intergenerational community* of members, caregivers, volunteers and families.** While SFV primarily serves older adults as they age, the power of the organization comes from the rich tapestry of stakeholders who come together to execute the mission. Younger and older



Research shows that social integration, a sense of belonging, and trusted close relationships will add years to a person's life and quality to those years.



adults working together and sharing interests, the children of aging adults learning how to support their parents, young volunteers offering time and support to members, and members of all ages sharing their expertise with one another.

3. To position our members and our organization to engage in the work of *social justice*. SFV recognizes that we are rooted in a larger social context, a microcosm in an interdependent social world. Members have shared their desire to contribute time and energy towards local and global issues they care about which include racial equity, climate justice, inequality, voting rights and guaranteed access to basic human rights, to name a few. We acknowledge our privilege and seek to leverage it in service to others. This priority responds to our members' need to know that their actions are purposeful, which gives meaning to their lives.

4. To strengthen the position of SFV at the *intersection of health care and social care*. For 13 years, SFV has been building the infrastructure for delivering social care, which we define as high-quality connections; access to resources; mutual aid and support; opportunities for volunteerism and social integration; and contributing to the greater good. Research shows that social integration, a sense of belonging, and trusted close relationships will add years to a person's life and quality to those years.⁴ In response to what has been called an epidemic of social isolation and loneliness, the healthcare industry, including Centers for Medicare and Medicaid Services (CMS), recognizes an urgent need to innovate and improve social support for older adults. Operating at the intersection of social care and health care, SFV is well-positioned to respond. At SFV, social care IS health care.

⁴ Julianne Holt Lunstad, Social Relationships and Mortality Risk: A Meta-analytic Review, <https://www.apa.org/members/content/holt-lunstad-loneliness-social-connections>

San Francisco Village

Strategic Plan Priorities For Growth and Sustainability

1 **Racial Equity**
Ensuring access and relevancy to a more diverse membership

3 **Social Justice**
Deepening meaning and purpose by connecting members and volunteers to important issues



2 **Intergenerational Community**
Strengthening our community through multi generations working together and learning from one another

4 **Health Care and Social Care**
Optimal health requires social care: access to resources, support, and community belonging

How We Will Do It

Our **People, Programs, Services, and Partnerships** are the **levers** that SFV can use to address these priorities and ensure growth and long-term sustainability. To that end, each initiative below is in service to the pillars of this plan: racial equity, social justice, intergenerational community, and optimizing health and well-being.

1. Our People: Investing in Staff and Board while Expanding our Membership and Volunteers

Attracting new members and volunteers, and retaining them, is key to the health of the organization. We will develop a recruitment and retention strategy that aims to be more accessible to more San Franciscans from a diversity of neighborhoods, races, cultures, gender identities, physical and intellectual abilities. Volunteers are at the center of the SFV intergenerational community and volunteer recruitment can be equally strategic when it comes to diversifying the community. We recognize that our committed staff and board of directors are the backbone of the organization. We invest in their development so they can lead.

1.1. SFV will examine our membership fee structure to ensure it is **inclusive and accessible**. SFV currently offers a sliding scale for membership. For some, paying a membership fee is an investment and helps create buy-in, but it can also be a barrier to participation for others.

1.2 SFV will expand outreach by **partnering with organizations** such as faith-based communities, schools, community centers, health care



SFV commits to a long-term growth strategy that includes diversity, equity, and inclusion (DEI) training for members, staff and board of directors.



providers, affinity groups and other community-based organizations whose constituencies are racially and culturally diverse.

1.3 SFV will create a recruitment strategy for older adults early in their retirement journey that leverages our knowledge and expertise about aging and **connects people to community**. These same people may have older parents they're caring for and need resources and guidance that SFV can provide.

1.4 SFV commits to a long-term growth strategy that includes **diversity, equity, inclusion (DEI) training** for members, staff and board of directors. SFV has retained b*free, a consultancy located in Washington DC, in a coaching capacity. Staff and board members will have access to consultations re: problem-solving, planning, conflict resolution, training and feedback. SFV will also benefit from the DEI Institute currently being developed by VMC, which will offer coaching, dialogue and a community of practice.

2. Our Programs: Diversifying Program and Delivery

SFV offers a wide variety of educational and expressive programs each month, addressing health and well-being, planning for the future, technology, visual and performing arts, local outings, and neighborhood circles. Given the priority of racial equity, adding programs that meet the needs of members from different ethnic, racial and cultural backgrounds will be essential to success. In addition, the coronavirus pandemic has changed how SFV delivers its programs. Some virtual experiences have worked well for members - especially those with mobility challenges or for specific kinds of interactions. In other cases, in-person is preferable in order to maximize accessibility and build relationships. Finally, interviews and surveys reveal that members want to be involved in larger

social issues and social justice initiatives. **Living lives of purpose and meaning is mission critical.**

2.1 SFV will create and deliver programs that intentionally attract members from the Black, Indigenous, Latinx and API communities. This will be accomplished by making connections in these communities with the support of trusted allies, and then undertaking **appreciative inquiry and active listening** to understand how the SFV model of social care might be adapted to meet different community and social/cultural needs.

2.2 SFV will explore opportunities for delivering programs in languages other than English. While SFV does not expect to become a fully multi-lingual organization in the next few years, offering programs and opportunities in **languages other than English** will provide a point of entry for members from different cultures.

2.3 SFV will build on the concept of neighborhood circles to develop circles around common interests and personal passions which may include areas of social justice, arts, humanities, and science. Volunteers of all ages will be invited and encouraged to participate. SFV will also explore a structure to create **circles of care** for members who are ill or at the end of life, and those who are caring for a loved one.

2.4 SFV recognizes that unpaid informal caregiving is the norm, and the needs of the caregiver are often overlooked. We will broaden our network with caregiving support organizations that will enable us to **better support caregivers** by connecting them with resources and expertise. We will explore the efficacy of creating our own caregiver support program.

““ Members are encouraged to think of SFV as a hub of connections, resources and support; their first phone call when they encounter a challenge, experience a transition or need more information to make a decision.



2.5 SFV will determine how to best use technology to deliver programs to ensure the greatest access to members and offer the right combination of in person, hybrid and remote programs. A curated archive of high-quality program recordings will provide asynchronous access for members and potential members.

3. Our Services: Optimizing Self-Determination

While programs are often designed to be delivered to groups of members, services are focused more on individual members with specific areas of need. In order to **navigate the transitions of aging and live independently at home**, members may require the support of a volunteer, counseling from a staff member or a referral to any number of professionals.

Members are encouraged to think of SFV as a hub of connections, resources and support; their first phone call when they encounter a challenge, experience a transition or need more information to make a decision. As members age well into their 90's, SFV has become a trusted source for facilitating big transitions. It is expected that SFV will need to grow capacity for responding to the climate crisis in terms of extreme heat, wildfire smoke, and future pandemics.

3.1 SFV will expand on our work with the California Pacific Medical Center (CPMC) Mission Bernal Campus, specifically the Hospital Readmission Prevention Program (HRPP) thereby increasing its value. We are working with Dr. Kristin Azar at the Sutter Institute for Advancing Health Equity, who plans to publish a paper on the HRPP outcomes. **Published data is critical to future revenue relationships with health**



Partnerships are the vehicle for achieving our goals and we will focus on developing partnerships that allow us to achieve our four primary priorities: racial equity, social justice, intergenerational community and optimal health and well-being.



care providers. We will continue to pursue inside introductions to Sutter physicians, researchers, and communications professionals.

3.2 The success of the HRPP program has provided opportunities to engage with more diverse communities in the southeastern part of San Francisco. SFV will do more proactive outreach to these communities, **preparing ourselves to be changed by what we learn** and ready for programs and services to look different in these communities.

3.3 SFV will actively pursue a **quality improvement project with a local health plan** resulting in Medicare payments to SFV and a more diverse group of constituents. A successful pilot will pave the way for other villages within VMC to pursue similar contracts.

3.4 The need for a **sophisticated database system** that coordinates rapid response during a public health emergency led SFV to partner with Mon Ami, a San Francisco start-up that's nearly finished building a customized platform for villages. It includes a mobile app and telephone system for connecting volunteers with older adults in need of groceries, prescriptions, and companionship. It captures the data associated with those connections, which health care and government partners will require. The ability to tell a data-driven story is critical to long-term sustainability.

4. Our Partnerships: Networking for Good

Partnerships are the vehicle for achieving our goals and we will focus on developing partnerships that allow us to achieve our four primary priorities: racial equity, social justice, intergenerational community and optimal health and well-being. Racial equity work is a long-term investment in ourselves and our partnerships, assuring potential partners that we are self-reflective, accountable and committed to the

social healing work that is needed. Partnerships aligned with our mission and values expand organizational capacity and open us to new opportunities for meeting the needs of our members.

4.1 We will explore opportunities to develop partnerships with **local and national organizations that are doing social justice work** in areas that our members are passionate about - voting rights, climate change, racial justice, economic inequality, immigration reform, and others.

4.2 We will explore potential collaborations with healthcare institutions that have a **similar mission for optimizing health and well-being** such as On Lok, Osher Integrative Medicine (UCSF), Institute for Health and Healing (CPMC).

4.3 Since its inception, the national Village Movement has been an **open-source network**, sharing hypotheses, tools, and outcomes. In that same spirit, SFV is committed to scaling the Village Movement in California and beyond through experimentation and shared knowledge. SFV remains an open and willing partner to all villages across the country.

4.4 We will expand partnerships with colleges, universities and high schools in San Francisco that have robust service and volunteer programs and already have high levels of social justice engagement.

4.5 SFV will engage partnerships in the technology sector to stimulate new ideas for program delivery, member engagement, and fund development.

Conclusion

The SFV strategic planning journey started in early 2020 and was immediately rerouted when the world shut down due to the Covid



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pandemic. Amidst confusion and uncertainty, SFV members, staff, board and volunteers took quick action and learned new ways to stay connected, resourced, and safe. A few months later, George Floyd was murdered and Black Lives Matter protests erupted around the world. SFV responded in solidarity and felt compelled to begin an examination of what it means to be a predominantly white organization in a white dominant culture. This strategic plan is born from that honest self-reflection and desire for an inclusive community that represents all San Franciscans, across race, culture, gender, and ability.

In the course of this 20-month journey, we have reaffirmed our commitment to connecting older San Franciscans to the community, resources, and expertise they need to navigate the transitions of aging in a changing world. At the same time, we are making explicit our commitment to a bigger vision that includes people of all ages, races, cultures and abilities working together to create a community of belonging and in so doing, demonstrate possibilities for relationship and connection that benefit the greater good.

Rooted in shared values, the Strategic Plan provides staff and board members a framework for operational and strategic decision making in the next five years. At the beginning of each fiscal year, staff and board will agree on an annual action plan outlining goals and objectives consistent with the priorities expressed in the Plan.

Progress will be monitored by both staff and board on a semi-annual basis, while members are encouraged to provide feedback in the Annual Member Survey. In addition, our open-door policy encourages members to provide suggestions, feedback and ideas for new programs and initiatives, throughout the year. The updated Plan will be presented to members of SFV at the State of the Village meeting in February 2022.

Appendix A

San Francisco Village Journey to the Future

	Who We Were (2009-15)	Who We Are (2015-21)	Who We're Becoming (2022 onward)
Our Focus	Aging in place/aging well	Aging in community/redefining aging	Embracing Eldership
Our Membership	White, predominantly middle class	More racial diversity, still predominantly white.	Multicultural, multiracial, intergenerational, truly reflecting the SF community
What We Do	Focus on practical needs. Uncomfortable talking about feelings	Embrace the whole person - physical, mental, spiritual needs all matter	Operationalize love, care and hope to foster personal and collective wellbeing
Orientation	Responsive, transactional, doing for	Proactive, relational, doing with	Innovative, reciprocal, co-creating
Value Proposition	Setting out to demonstrate the value of membership	Confident in our expertise around aging, partnering and innovating.	Leading at the intersection of healthcare and social care
SFV Cultural Identity	Unconscious bias for white cultural norms	Growing awareness that these norms are exclusive, not representative	Explicit commitment to equity and social justice
Our Inner Journey	Learning how to be a village, focused on function	Willing to take risks, be more self-reflective, respond to broader range of member needs	Expansive, bold, open, curious, committed to being self-aware and in conscious relationship with this moment in history
Metaphor	Seed	Sapling	Mother tree

Appendix B

Methodology

Prior to initiating the strategic planning process, SFV board and staff members engaged the services of [b*free](#), a diversity, equity and inclusion consultancy, to undertake a deep exploration of why SFV has remained a predominantly white organization, and how to transform that. Nine months into that initiative, SFV contracted with [Leadership + Design](#) and its principal, Carla Silver to guide an eight-month strategic planning process. A team of seven (four board members, the executive director and two at-large members of SFV) identified several questions to guide their inquiry. For example:

- What does SFV want to look like in five, ten, twenty years? Who will our community include in the future?
- How will SFV connect with communities of color, older adults with disabilities, lower income older adults and develop programs and services that meet their specific needs?
- What does equity look like at SFV?
- What economic, political, technological, environmental, and demographic trends will impact aging San Franciscans in the future?

The team of seven conducted empathic interviews with 26 stakeholders: SFV members, volunteers, partners, staff, and funders. Empathic interviews rely on curiosity and story telling to reveal key insights. From these insights, needs and patterns emerged that led to discussion of common themes, leverage points and strategic priorities. Carla Silver and Kate Hoepke, SFV Executive Director, incorporated interview data, team discussions and feedback from staff and board members to draft the Strategic Plan.

[Courage Corps](#), and its principal Diane Tompkins, led a team of ten board and staff members to reimagine the mission, vision and values, in the context of our 13-year developmental history. These statements provide the foundation that upholds the framework of the Strategic Plan.